Retention Management Software IRR Affiliation Program User Guide

Privacy Act Statement

This is documentation for a DOD web site. The security accreditation level of the site is classified as FOUO and below. Do not process, store, or transmit information classified above the accreditation level of the system. DOD web sites may be monitored for all lawful purposes, including to ensure their use is authorized, for management of the system, to facilitate protection against unauthorized access, and to verify security procedures, survivability, and operational security. Monitoring includes, but is not limited to, active attacks by authorized DOD entities to test or verify the security of this system. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All information, including personal information, placed on or sent over this system may be monitored. Use of this DOD web site, authorized or unauthorized, constitutes consent to monitoring. Unauthorized use of the DOD web site may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal, or other adverse action. Use of this system constitutes consent to monitoring for all lawful purposes.

Privacy Act Statement

Authority: 10 U.S.C. 3013, Secretary of the Army; Army Regulation 600-8-23, Standard Installation/Division Personnel System Database Management; and E.O. 9397 (SSN)

Principal Purpose: The Reserve Component Management System - Guard (RCMS-G) collects data verify eligibility for benefits, incentives, and to process and consolidate source data from multiple locations into usable information that serves as the source information for force structure-forecasting models, decision support applications, tools and reporting capabilities.

Routine Uses: None. This information will not be disclosed outside of the Department of Defense other than the "Blanket Routine Uses" as published in the Federal Register.

Disclosure: Providing the solicited information is voluntary; however, failure to provide this information may result in the Army National Guard being unable to process your request for education benefits, incentives, etc. Furnishing of the information solicited is voluntary; however, failure to provide this information may result in the Army National Guard being unable to process your request for education benefits, incentives, etc.

Registration Information

Why do we need your Social Security Number? Social Security Number (SSN), Date of Birth (DOB), and other verifiable data is gathered from enlistment records covered under blanket routine uses to authenticate who you are. Additional verifiable data fields can be modified to reflect updated information. Your SSN will be stored with your account and is shared with agencies and organizations involved in the benefits eligibility process and strength forecasting.

Is it safe?

Security during transmission is ensured using a 128-bit Secure Socket Layer (SSL) connection. This is the highest industry standard and establishes an encrypted session between your computer and RCMS-G site services. We use the same technology that other major companies operating on the World Wide Web (WWW) use to protect personal information and guard against identity theft. Look for the little yellow padlock at the bottom of your browser window to ensure that you have established a secure connection. There are no alternate means of registration as this is the most secure method of protecting your information.

Table Of Contents

1 RMS IAP What's New **8**

2 Requesting Access to AR RCMS **10**

3 Creating a new user profile **11**

3.1 Searching by United States Army Reserve Headquarters 13

3.2 Searching by Unit Name / Unit Number 14

3.3 Searching by Unit Identification Code (UIC) 14

3.4 Searching by zip code of the unit location 15

3.5 Requesting Access to Applications 15

4 Application Overview **17**

4.1 Introduction to Case Management 17

5 Accessing the Application **19**

5.1 Command Center 20

5.1.1 IRR Affiliation Program 20

5.1.2 Viewing Information about a Soldier 21

5.1.3 Affiliating a Soldier 23

5.1.4 Additional Actions 24

5.1.4.1 Action History 24

5.1.4.2 Point of Contact 24

5.1.4.3 Documents 25

5.1.5 Additional Work Buckets ... 29
5.2 Leadership Reports ... 30
5.2.1 Explanation of different leadership reports ... 30
5.3 Request Upgrade ... 31
5.4 Tools ... 32
5.5 Help ... 32
5.6 Contacting the Help Desk ... 32
6 Glossary of Icons ... 33
7 Appendix A ... 34
7.1 Reports ... 34
7.1.1 Drilling Down ... 37
7.1.2 Base Reports ... 38
7.1.3 Report Information Panel ... 38
7.1.4 Applied Filter Criteria Panel ... 39
7.1.5 Report Tools Panel ... 39
7.1.5.1 Basic Edit Report ... 39
7.1.5.2 Advanced Edit Report ... 42
7.1.5.3 Sort the Report ... 47
7.1.5.4 Go to Base report ... 47
7.1.5.5 Save Report As ... 48
7.1.5.6 Email This Report ... 48

7.1.5.7 Subscribe to This Report 48
7.1.5.8 Add S-Report 48
7.1.5.9 View Report Data In Dashboard Format 49
7.1.5.10 Export Report Data to Excel 49
7.1.5.11 Print Report 49
7.1.5.12 Report Home Page 49
7.1.5.13 Go To Previous Page 49
7.1.5.14 Report Help 49
7.1.5.15 Help 49
7.1.5.16 Time Series 50
7.1.6 Basic Report 50
7.1.6.1 Creating a Report 51
7.1.6.2 Select Measurements 51
7.1.6.3 Select Column Dimensions 52
7.1.6.4 Add Filters 53
7.1.6.5 Generating and Viewing the Report 54
7.1.6.6 Editing a Report 55
8 Appendix B 56
8.1 Dashboards 56
8.1.1 Common Elements within Dashboards 56
8.1.1.1 Gauge View 59

8.1.1.2 Horizontal Slide Scale View 61
8.1.1.3 Comparative Trend Chart View 62
8.1.1.4 Benchmark Chart View 63
8.1.1.5 Data Grid Views 63
8.1.1.6 Historical Trend Chart 64
8.1.2 Metrics Panels 65
8.1.2.1 Save Dashboard 66
8.1.2.2 Load Dashboard 67
8.1.2.3 New Dashboard 69
8.1.2.4 Metric Boxes 71
8.1.3 Basic Dashboard 74
8.1.3.1 Accessing Basic Dashboard 75
8.1.3.2 Adding Metric Boxes 75
8.1.3.3 Removing Metric Boxes 75
8.1.3.4 Replacing One Metric Box with Another 76
8.1.3.5 Saving Dashboards 76
8.1.3.6 Loading Dashboards 77
8.1.3.7 Subscribing to a Dashboard and Exporting a Dashboard to PowerPoint 77
8.1.4 Advanced Dashboard 77
8.1.4.1 Main Tab 78
8.1.4.2 New Elements Tab 81

8.1.4.3 Selected Elements Tab 116

9 Appendix C 121

9.1 Search 121

9.1.1 Saved Searches 122

9.1.2 Recent Searches 122

9.2 Preferences 122

9.3 Rucksack 123

9.3.1 Rucksack Dashboards 123

9.3.1.1 Adding a Background Image to your PowerPoint Slide 124

9.3.2 Rucksack Reports 125

9.3.3 Decks 127

1 RMS IAP What's New

Version 2.1.3.0—Released 2012/02/27

New Features

- The “Affiliation By Unit,” “Affiliation By Unit Goal,” and “Affiliation MOS Match” Default Dashboards are now available within the “Default Dashboards” drop-down menu for select users.

Resolved Issues

- The “Find by SSN” and “Find by Case ID” features are now working properly.
- The automatic email functionality is not properly formatting some names.
- Occasionally, the Contact Information section within the fourth panel displays “Undefined” in the Name field.

Known Issues

- IAP reports are currently showing all cases, and have not yet been reconfigured to show Open cases only.

Version 2.1.2.0—Released 2012/01/16

New Features

- The IRR Affiliation Program module is now available to users with the necessary permissions.
- Tooltips are now available within the module.
- DEERS, Pay Information, Personnel Information, and Contact Information tabs are now available within the third panel of the module.

Resolved Issues

- Users can now edit a Contact History record.
- The IAP drill-down report is now sorting correctly.
- A "Next" button has been added to the Affiliation screen to allow users to view the Welcome Letter screen.
- The Annual Letter work bucket is now functioning correctly.
- Users without Affiliation permissions are no longer able to change affiliation data.
- Data is now saving correctly when a Soldier is affiliated to an Army National Guard Unit.

Known Issues

- Multiple Welcome Letters can be issued to the same Soldier.
- Submitting an upgrade request within the Upgrade Access Request section is not currently working.
- The filter drop-down list within the Contact History tab is not filtering the records in the grid.
- Export to Excel and Export to PDF from the Case list screen is not working.
- An error is shown when attempting to upload multiple files.

2 Requesting Access To AR RCMS

You are a new Army Reserve (AR) Reserve Components Manpower System (RCMS) user if you have never accessed the website before, or if the last time you accessed the website was more than six months ago. This guide is intended to show a new user how to access the RCMS website and how to request permissions to applications within RCMS.
Note: All personally identifiable information (PII) appearing in figures in this guide has been edited and/or elided completely for privacy and confidentiality reasons.

Prerequisite: Common Access Card (CAC)

If you do not have a CAC, please acquire one before proceeding.

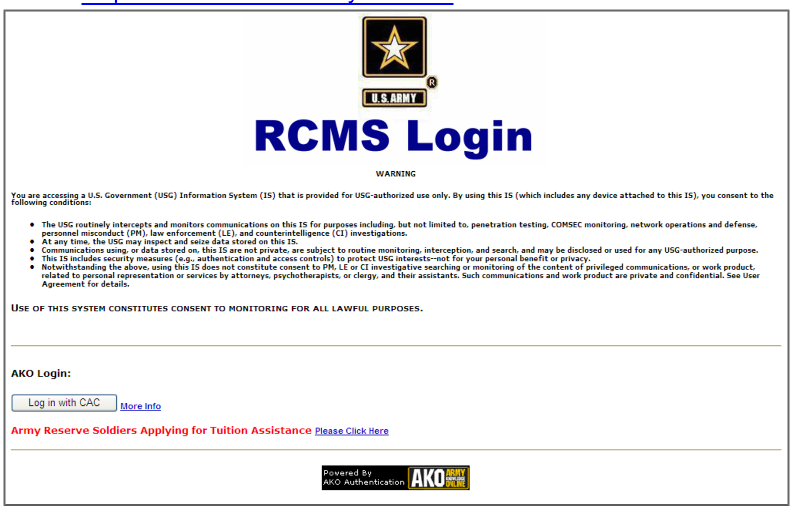
Note: You need a security clearance and the sponsorship of the Contracting Officer's Representative (COR) to obtain a CAC.

To begin applying for access to RCMS applications, you need to create a new user profile. Your user profile is viewed by RCMS site administrators to grant you access privileges to the applications hosted on the website.

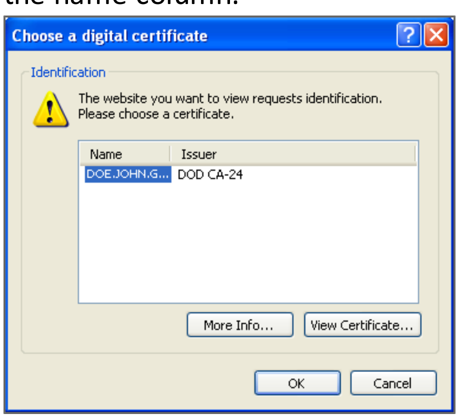
3 Creating A New User Profile

1. Insert your CAC into the card reader, picture side up, bottom of the card first, so that the black and white strip on the bottom left-hand corner of the card has been fully inserted into the reader.

2. Go to https://rcms.usar.army.mil/v3/.

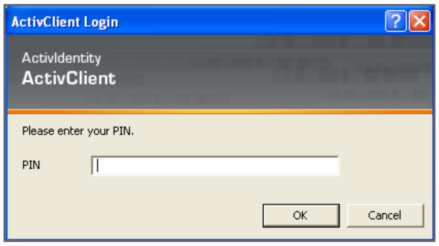


3. Click **Log in with CAC**.
   A message box opens, prompting you to select a digital certificate, with your name already in the name column.



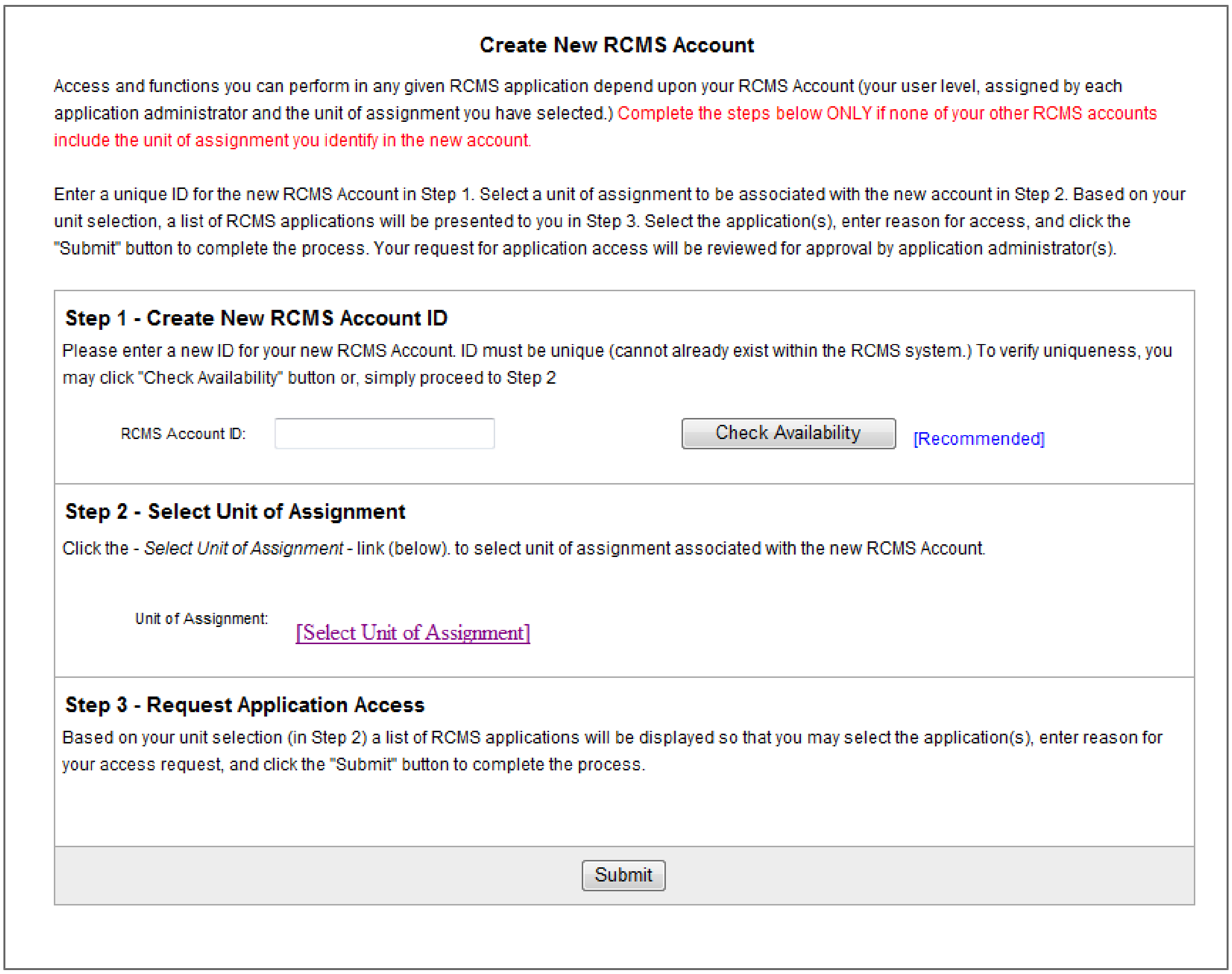
4. Click **OK**.

   A new message box opens, prompting you for your PIN.

5. Enter your **PIN**.
6. Click **OK**.

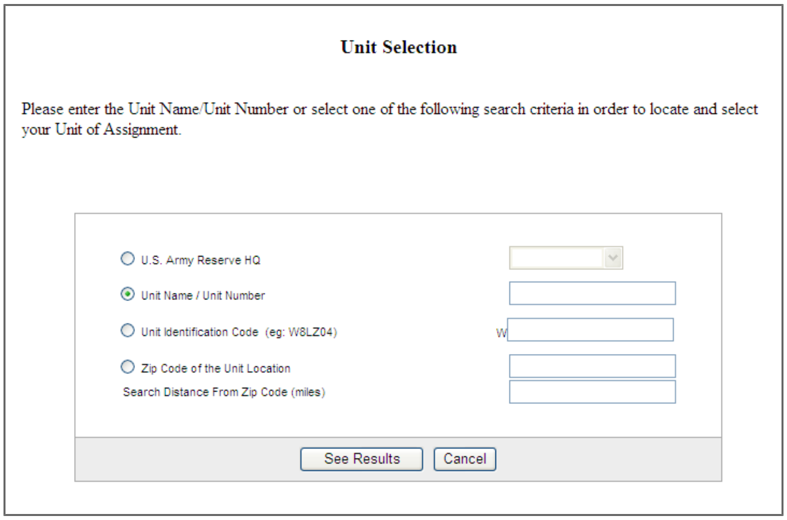
   A New User Registration screen appears.

7. Enter a unique RCMS Account ID, and click **Check Availability** to ensure that it is available.
8. Click **Select Unit of Assignment**.

   A screen appears to help you select your unit and/or to search for it using one of four search criteria.

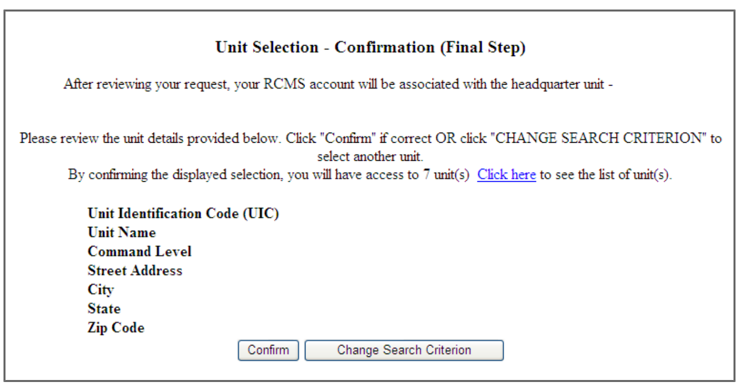
9. Choose a search criterion by selecting the appropriate radio button.



Note: All fields are not required. Fill in only the field that corresponds to the selected radio button.

3.1 Searching By United States Army Reserve Headquarters

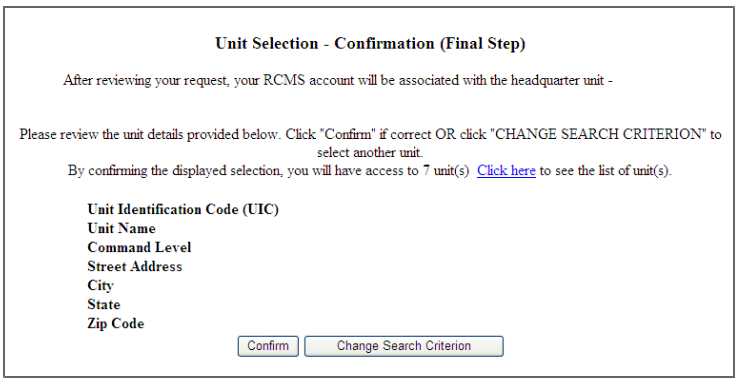
1. Select the **U.S. Army Reserve HQ** radio button.
2. Select the option from the drop-down menu that applies to you.
3. Click **Select**.
   A new screen appears with your unit information already filled in, asking you to confirm your Unit Selection.



   Note: If this unit is incorrect, click **Change Search Criterion** to return to the Unit Selection screen and change the criterion with which you search for the unit.
4. Click **Confirm**.
   The Application Access Request screen appears, with your chosen unit listed, and a list of applications to which you can request access.

3.2 Searching By Unit Name / Unit Number

1. Select the **Unit Name / Unit Number** radio button.
2. Enter the unit name and number in the field.
   Tip: You may enter only a part of the unit name and number to bring up every unit with that part in its name and number in the search results.
3. Click **See Results**.
   A new screen appears with your unit information already filled in, asking you to confirm your Unit Selection.

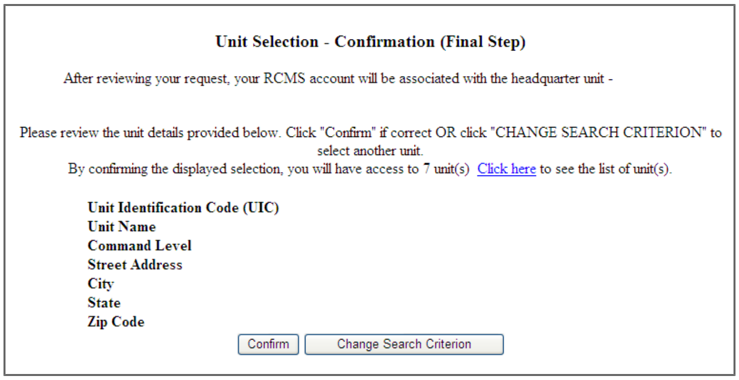


   Note: If this unit is incorrect, click **Change Search Criterion** to return to the Unit Selection screen and change the criterion with which you search for the unit.
4. Click **Confirm**.
   The Application Access Request screen appears, with your chosen unit listed, and a list of applications to which you can request access.

3.3 Searching By Unit Identification Code (UIC)

1. Select the **Unit Identification Code** radio button.
2. Enter your Unit Identification Code (UIC), excluding the initial “W,” as it has already been incorporated into the form.
3. Click **See Results**.
   A new screen appears with your unit information already filled in, asking you to confirm your

Unit Selection.



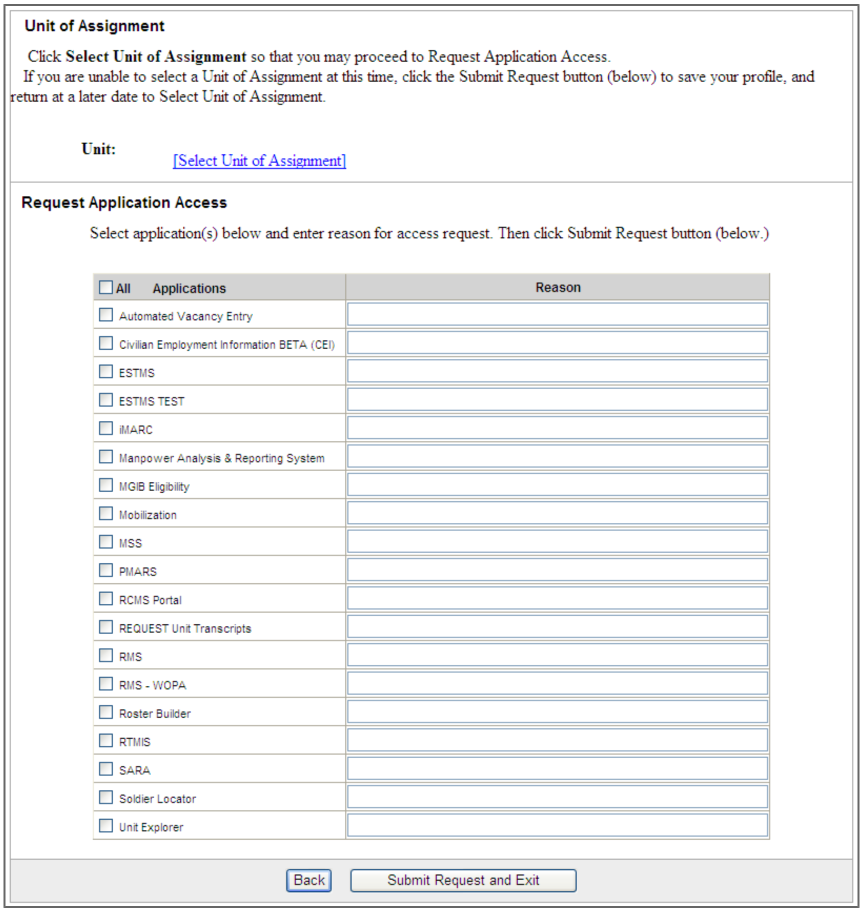
4. **Note:** If this unit is incorrect, click **Change Search Criterion** to return to the Unit Selection screen and change the criterion with which you search for the unit.
5. Click **Confirm**.
   The Application Access Request screen appears, with your chosen unit listed, and a list of applications to which you can request access.

3.4 Searching By Zip Code Of The Unit Location

1. Select the **Zip Code of the Unit Location** radio button.
2. Enter the radius size of your search, in miles, in the **Search Distance From Zip Code (miles)** field.
3. Click **See Results**.
   The Application Access Request screen appears, with your chosen unit listed, and a list of applications to which you can request access.

3.5 Requesting Access To Applications

1. Select the checkbox next to each application for which you want to request access, giving a reason in the corresponding **Reason** field to the right.

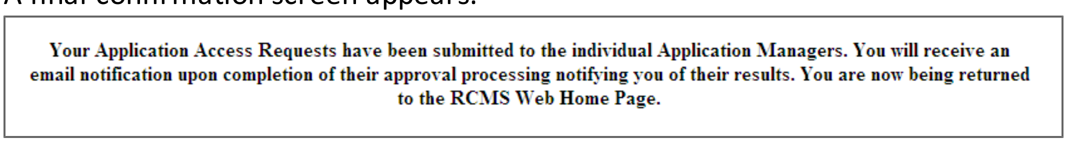


Tip: Select the All checkbox at the top of the table if you wish to request access to all of the applications.

Note: You will not be allowed to proceed without a reason for each selected application.

2. Click **Submit Request and Exit**.

   A final confirmation screen appears.



Your Application Access Requests have been submitted to the individual Application Managers. You will receive an email notification upon completion of their approval processing notifying you of their results. You are now being returned to the RCMS Web Home Page.

You are returned to the RCMS Web Home Page.

4 Application Overview

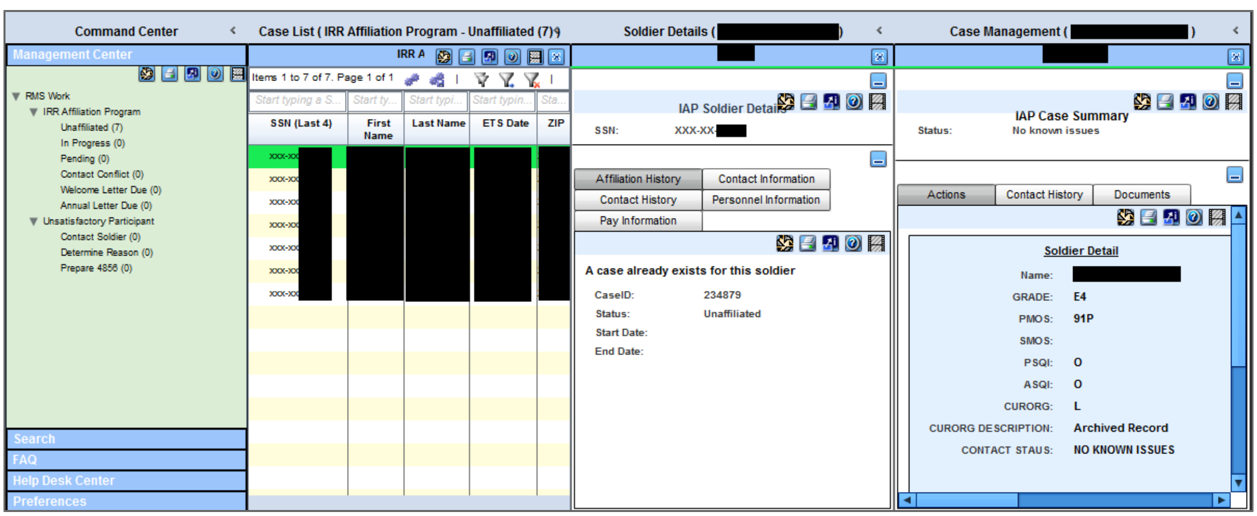
The Retention Management Software (RMS) application allows users with varying roles and permissions to conduct their everyday job responsibilities. The IRR Affiliation Program (IAP) module within the RMS application assists users in the process of affiliating those Soldiers who have not previously been assigned to a particular unit. The overall purpose of the IRR Affiliation Program is twofold; it is intended to not only assist with affiliating Soldiers, but also to facilitate better communication between Soldiers and their Units.

4.1 Introduction To Case Management

The RMS IAP application incorporates Case Management, which is a user interface that allows users to accomplish all of their work from just a few screens. The screen is divided into four panels, each of which performs a different function.

Note: Each panel can be collapsed or expanded at any time by clicking the arrow icon ( ) in the corner of the panel.

Note: To expand or collapse the Ribbon Toolbar at the top of the screen, click the downward-facing arrow next to the navigation icons.



The *Command Center*, located in the first panel on the far left of the screen, is a navigation panel intended to allow users to navigate between different "work buckets," or groups of work that they need to complete. Users can also access other sections of the application, such as the Reporting Center, Search, and their Preferences through the *Command Center*. Work buckets are viewable according to the user role and permission level a user is assigned. This means users see only the actions to be performed. On this panel, users can view the specific work buckets they have access to and see how much work needs to be done in each bucket. For example, if a user sees a number in parentheses next to a work bucket, the application is informing them that there is an action that must be performed to progress a Soldier to the next step.

The second panel, Soldier Roster, generates a Soldier list based upon which work bucket has just been selected. The Soldier list displays information such as Soldier name, Social Security Number (SSN), ETS Date, Zip Code of their Unit, etc. Users can select any Soldier from this list to view detailed information about that Soldier. After clicking a Soldier, the third and fourth panels are populated, and the first and second panels are automatically collapsed.

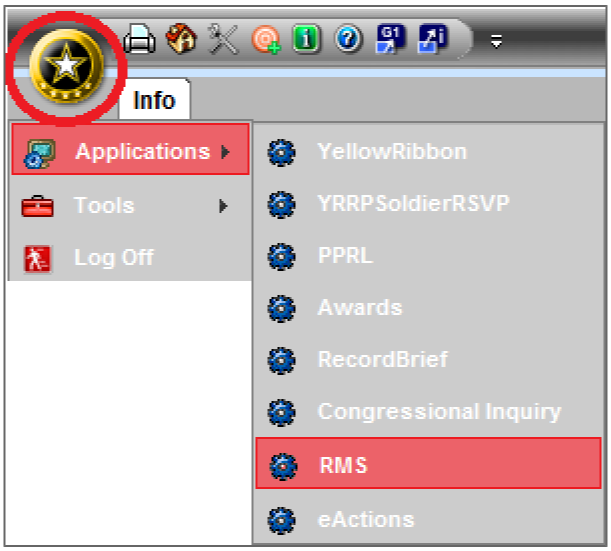
Soldier Details, located in the third panel, includes information about the specific Soldier a user selected, including Personal data, Personnel data, Contact History, and other data available within the RMS IAP application.

The fourth panel, Case Details, allows users to perform different actions associated with Soldiers and complete their work. Actions within this panel include updating the Soldier's Contact Information, affiliating a Soldier to a Unit, and uploading documents.

5 Accessing The Application

1. Access the USAR Portal Login page at https://rcms.ocar.army.pentagon.mil/v3

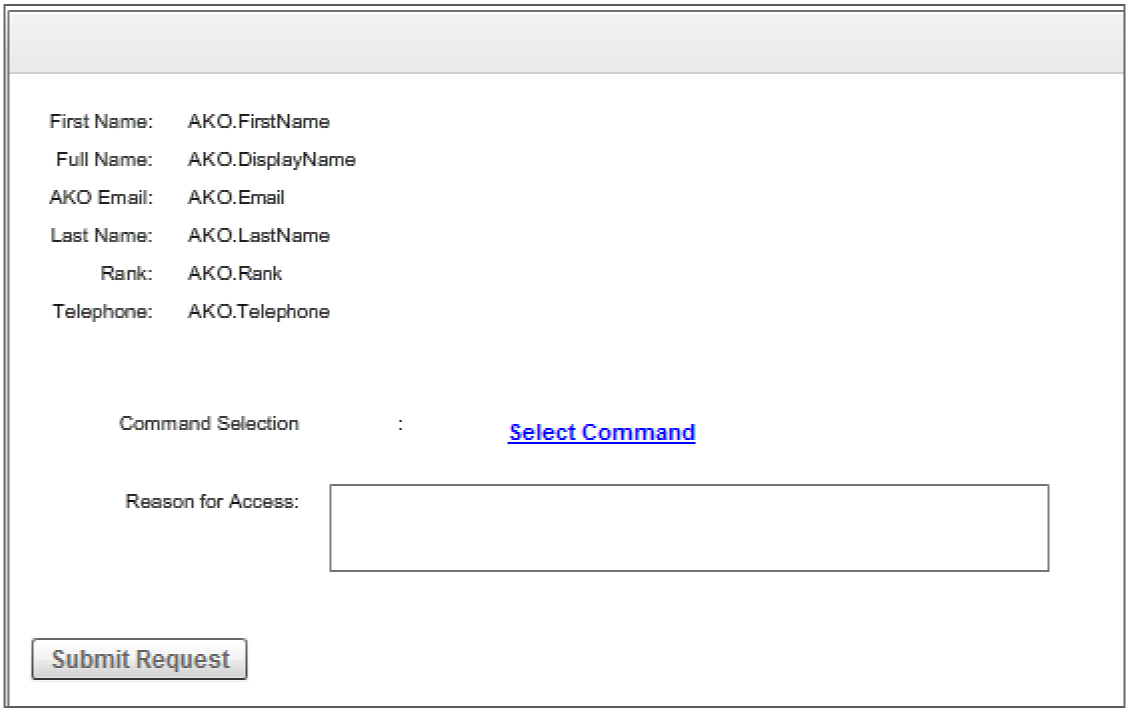
2. Click the USAR Orb, hover over "Applications," and click RMS IAP.



   The RMS IAP landing page appears.

3. Click **Request Access**.

4. Enter your Command level and Reason for Access, and click **Submit Request**.



Your request is submitted to the application manager, and you should receive a response to your request within a few days.

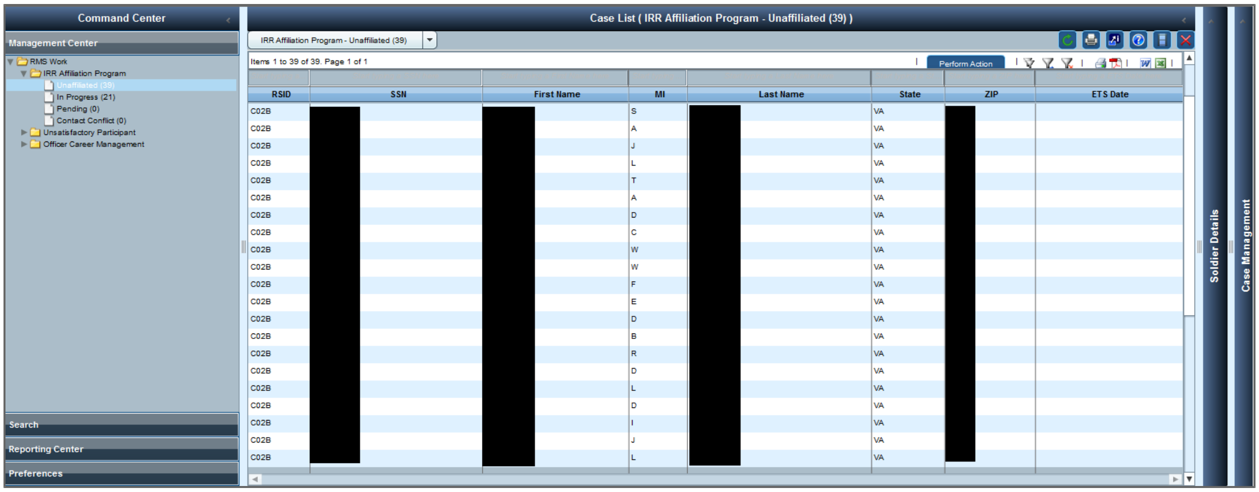
5. After receiving access, click the **Command Center** icon on the Ribbon Toolbar.

5.1 Command Center

The Command Center is where you will perform all of your job duties within the RMS application.

5.1.1 IRR Affiliation Program

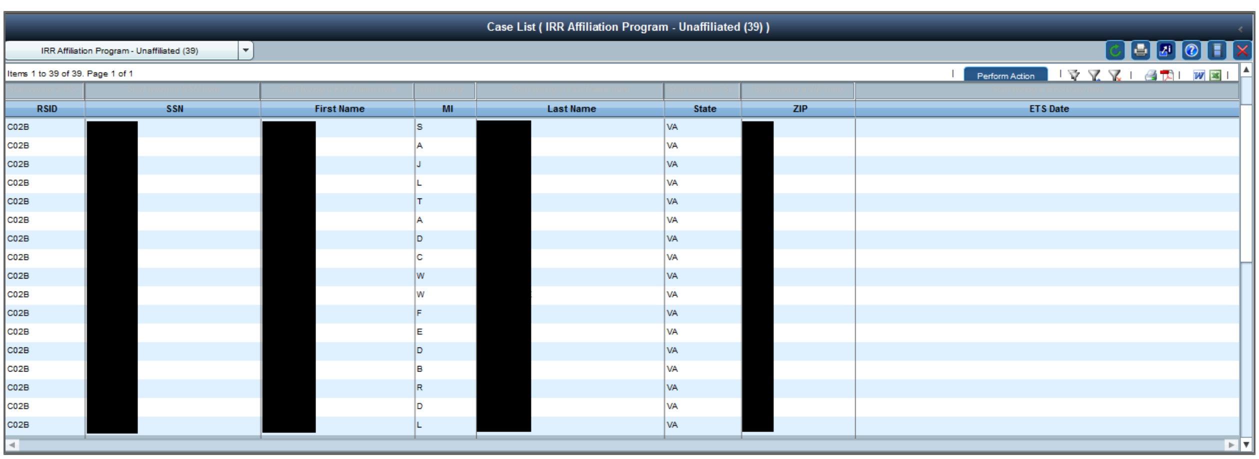
From the RMS home screen, you can access the IRR Affiliation Program module from the Command Center menu.



Note: In this example, there is a number "39" next to the *Unaffiliated*work bucket, indicating that thirty-nine Soldiers have not yet been affiliated.

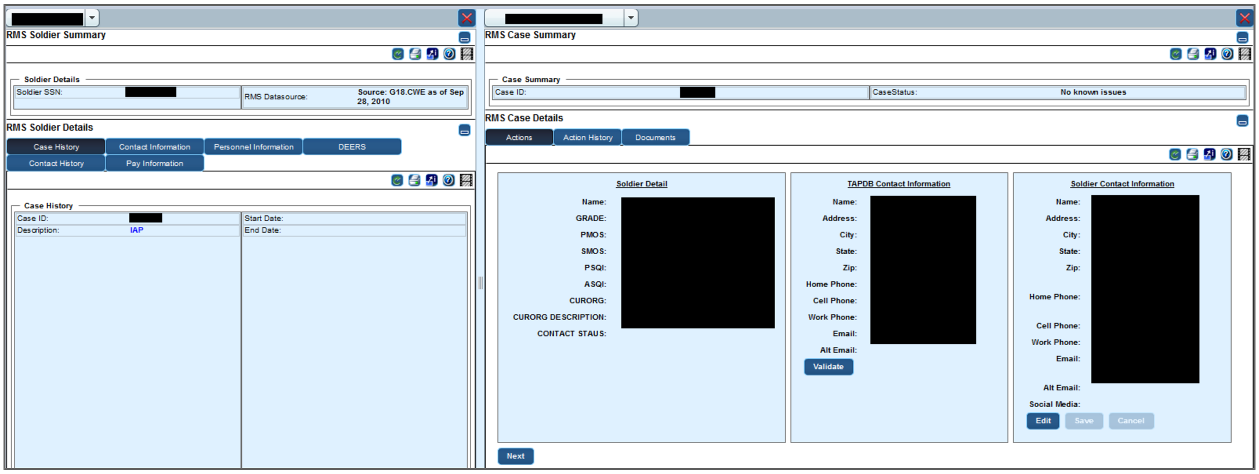
5.1.2 Viewing Information About A Soldier

1. Click the **Unaffiliated** work bucket underneath the *IRR Affiliation Program* tab within the first panel.
   The "IRR Affiliation Program – Unaffiliated" list appears.

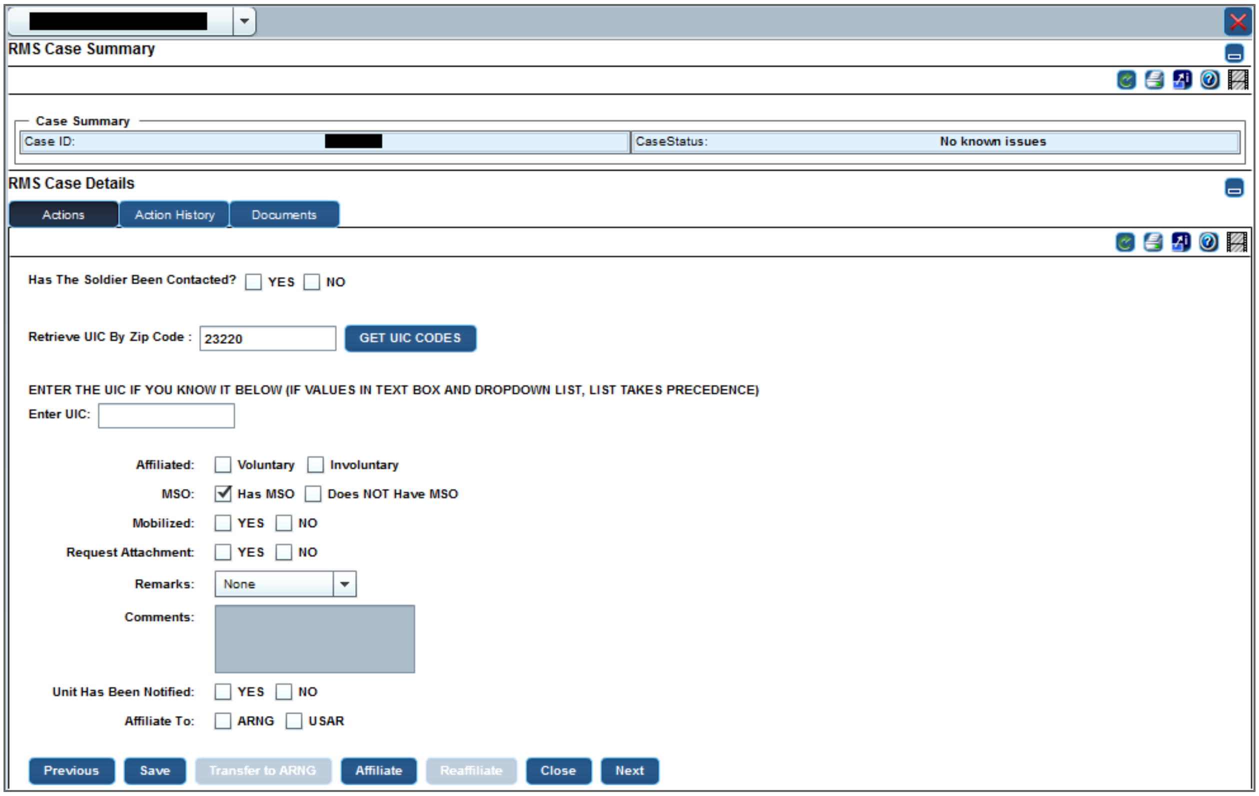
   Note: For information about the icons visible at the top of the IRR Affiliation program – Unaffiliated list, see the Glossary of Icons on page 33.
   Note: To quickly filter the list by Name, SSN, or any other visible column, begin typing in the textbox above the relevant column.
2. Click a Soldier Name or SSN from the Soldier List.
   The third and fourth panels populate, while the first and second panels are collapsed.
   Note: If you have clicked multiple Soldier's names, you can switch between them by clicking

the drop-down menu next to the Soldier's name at the top of each panel, and choosing the previously selected Soldier's name.



3. View the specific Soldier information contained within the third panel.
   Note: If the Soldier has multiple Case IDs, click the desired Case ID number to view the information corresponding to that Soldier's Case within the fourth panel.
4. Click **Edit** if the Soldier’s Contact Information needs to be updated.
   The fields in the Soldier Contact Information table become editable.
5. Click **Validate** in the TAPDB Contact Information table once the information is accurate.
   The Affiliation screen appears.
   Note: After Validating the Soldier’s information, you are able to complete or terminate the case on any screen by clicking the **Complete** or **Terminate** buttons, respectively.
   Note: You can proceed to the next step in the process without validating the Soldier’s Contact

Information, but cannot complete the Soldier's Case until this information has been validated.



5.1.3 Affiliating A Soldier

1. Indicate whether the Soldier has been contacted by checking Yes or No.
2. Enter a Zip Code into the text box and click Get **UIC** Codes.
   A drop-down list appears containing a list of Units with the Unit Name, distance (in miles) from the input Zip Code, and the number of Soldiers who have been affiliated to the Unit.
3. Select a Unit from the drop-down list, or enter a UIC into the text box located below the drop-down list.
4. Select whether the affiliation is Voluntary or Involuntary.
5. Select whether the Soldier has met his/her Mandatory Service Obligation or not.
6. Select whether the Soldier has been Mobilized or not.
7. Select whether the affiliation requires an attachment to be included.
8. If desired, choose a remark from the "Remarks" drop-down list.
9. If desired, enter a comment in the "Comments" text box.
10. Select whether the Unit has been notified of the affiliation.
11. Choose to affiliate the Soldier to either the USAR or the ARNG.
12. Click **Affiliate** to complete the affiliation process.
    Note: Click **Save** to save the work that has been completed so that you can return to this case at a later time. If you click **Save**, you can revisit this Soldier's case within the "In Progress"

work bucket, located on the first (far left) panel.
Note: Click **Previous** in order to return to the Soldier Information screen.

13. Click **Send Welcome Letter**.
    The Soldier is sent a Welcome Letter.
14. Click **Send Annual Letter**.
    The Soldier is sent an Annual Letter.

5.1.4 Additional Actions

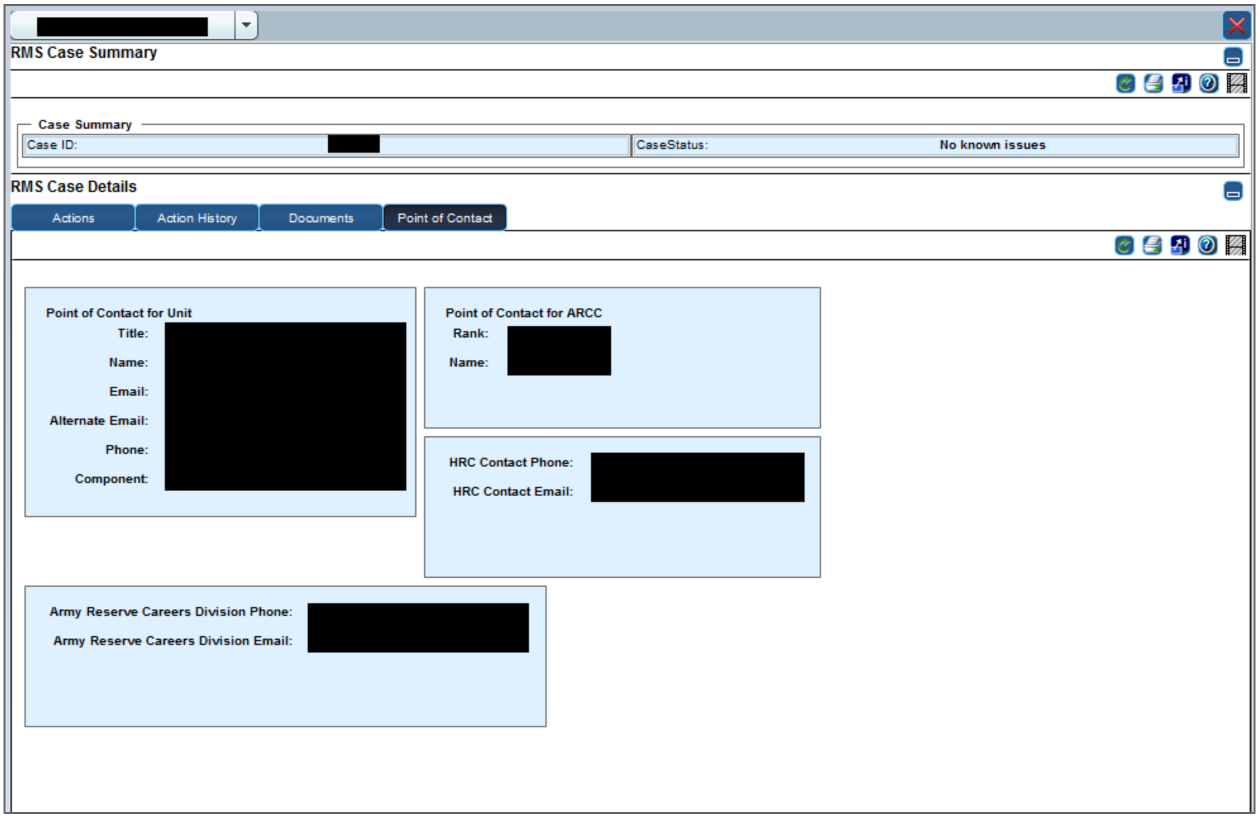
By default, the fourth panel opens with the "Actions" tab selected. The Action History, Point of Contact, and Documents tabs can also be viewed within this panel.

5.1.4.1 Action History

1. Click the **Action History** tab.
   The tab opens showing you information about previous actions completed for this Soldier.

5.1.4.2 Point Of Contact

1. Click the **Point of Contact** tab.
   The tab opens with Point of Contact information relevant to the Unit to which the Soldier has been affiliated.

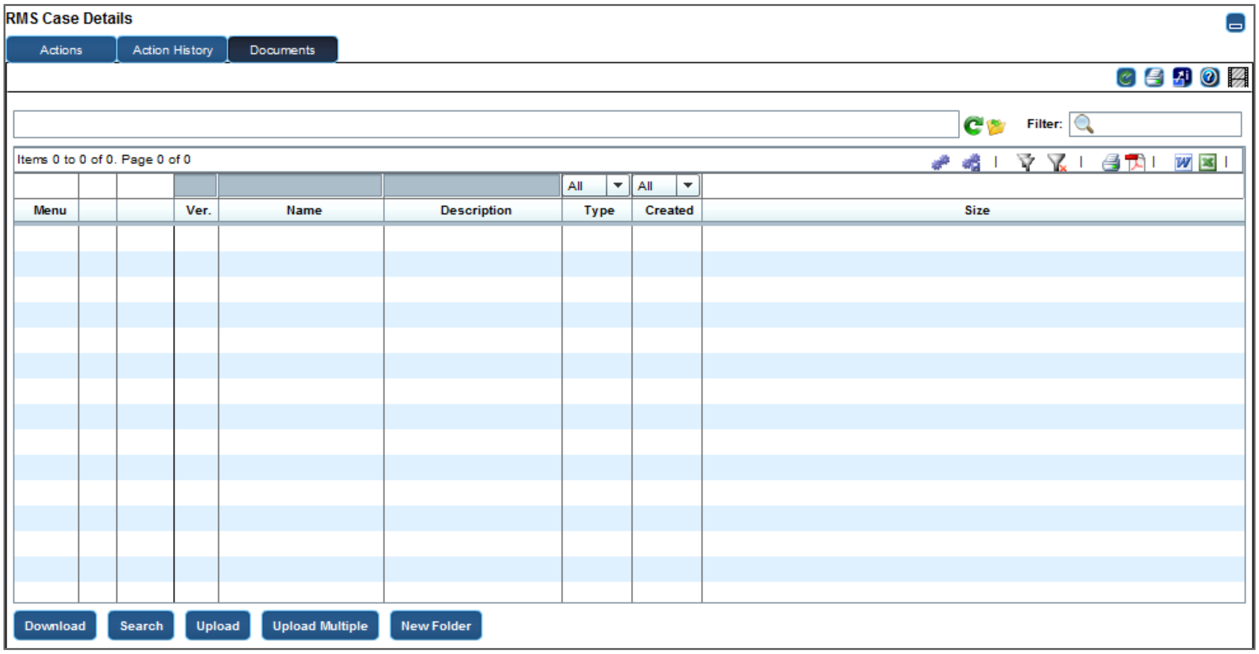


Note: If the Soldier has not yet been affiliated to a Unit, this tab will be empty.

5.1.4.3 Documents

The Documents tab allows users to search, download, and upload files pertaining to the selected Soldier and Case, and also allows additional folders to be created within which files can be stored.
Note: If there are multiple Cases associated with a Soldier, there could be different documents avail-

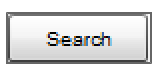
able within this tab for each Case.

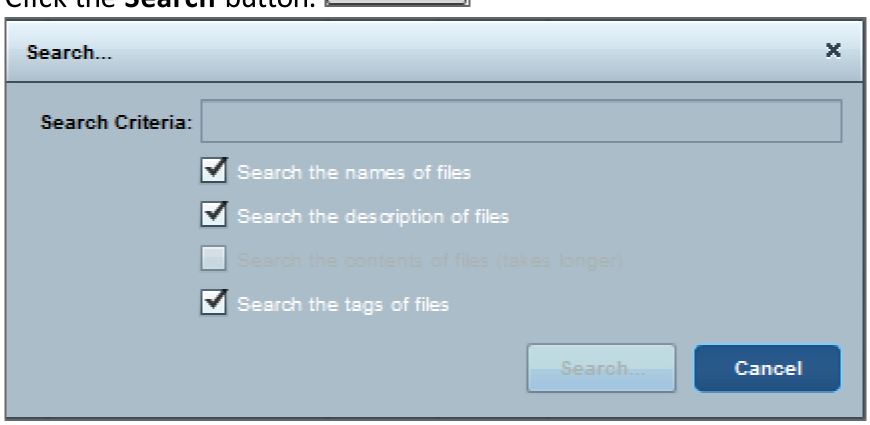


5.1.4.3.1 Searching For A File

You can perform two types of searches within the Documents tab. You can perform a Global Search to locate a file by key words or tags associated with it, or you can use the filters available in the grid to locate a file.

5.1.4.3.2 Performing A Search

1. Click the **Search** button. 



2. Type search criteria in the available textbox.

3. Optionally, select any or all of the available checkboxes: Search the names of files, Search the description of files, Search the contents of files, or Search the tags of files.
4. Click **Search**.
   A list of all files and folders that matches the search criteria appears.

5.1.4.3.3 Filtering

There are many filter options available within the Documents tab.

Each column has a filter field above the column title. If you enter filter criteria in the filter field, only records that contain the filter text will be displayed.

Also, there is a general Filter field in the top right-hand corner of the screen. The application will display only those records that have the filter content in any of the available data columns.

5.1.4.3.4 Creating A Folder

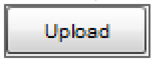
You can organize your files in the Documents tab into folders. If an appropriate folder does not already exist for your document, you can create a new folder.

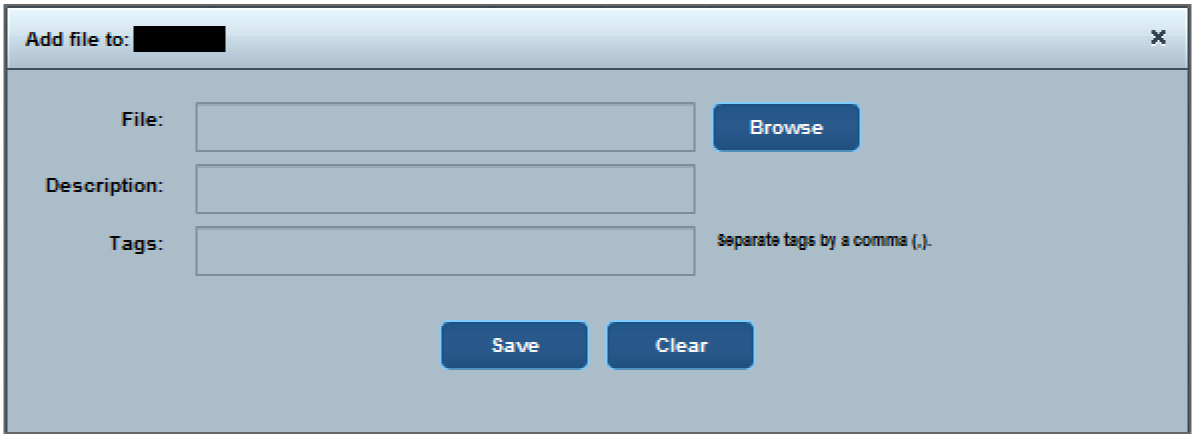
1. Select the folder in which you want to create your new folder, and click **New Folder**.
   

   The New Sub Folder screen opens in a new window.
   

2. Type a Folder Name.
3. Type a description in the available textbox.
4. Click **Save**.
   The folder is created.

5.1.4.3.5 Uploading A Single File

1. Navigate to the folder to which you want to add the file.
2. Click the **Upload** button. 

   The Add File dialog box opens.
   

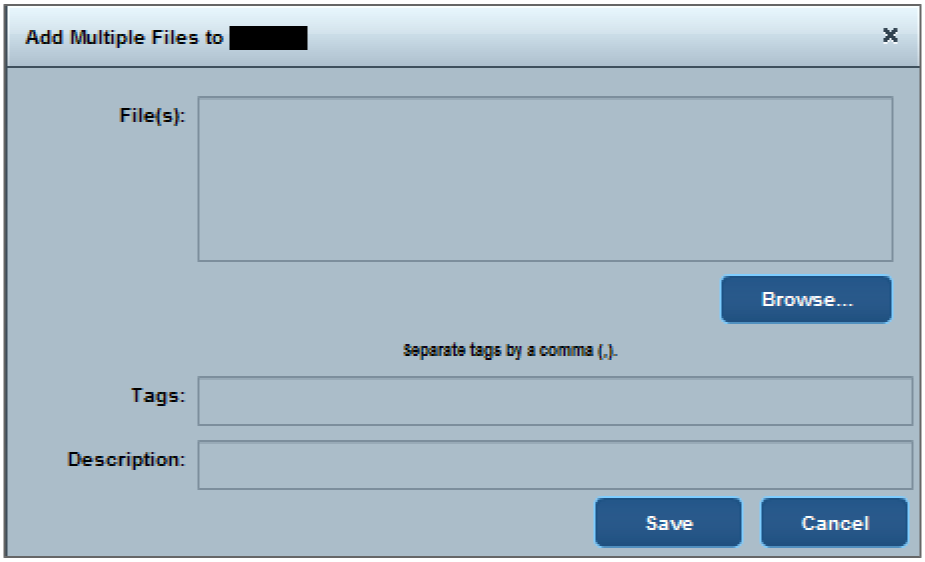
3. Click the **Browse** button. 

4. Navigate to the file, and click **Open**.
   The File field is populated with the name of the file.
5. Type a description in the Description textbox.
6. Type any tags in the Tags textbox, separating each tag with a comma.
7. Click **Save**.

5.1.4.3.6 Uploading Multiple Files

1. Navigate to the folder to which you want to add the files.

2. Click the **Upload Multiple** button. 

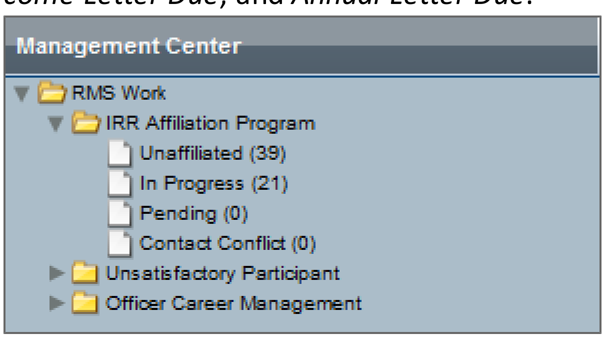
   The Add Multiple Files dialog box opens.
   

3. Click the **Browse** button. 

4. Navigate to the file, select any number of files, and click **Open**.
   The File(s) field is populated with the name of the files.
5. Type any tags in the Tags textbox, separating each tag with a comma.
6. Type a description in the Description textbox.
7. Click **Save**.

5.1.5 Additional Work Buckets

Additional work buckets within the RMS IAP module include *In Progress*, *Pending*, *Contact Conflict*, *Welcome Letter Due*, and *Annual Letter Due*.



These work buckets become populated for the following reasons:

- *In Progress*: This work bucket is populated when the user clicks **Save** without affiliating the Soldier.

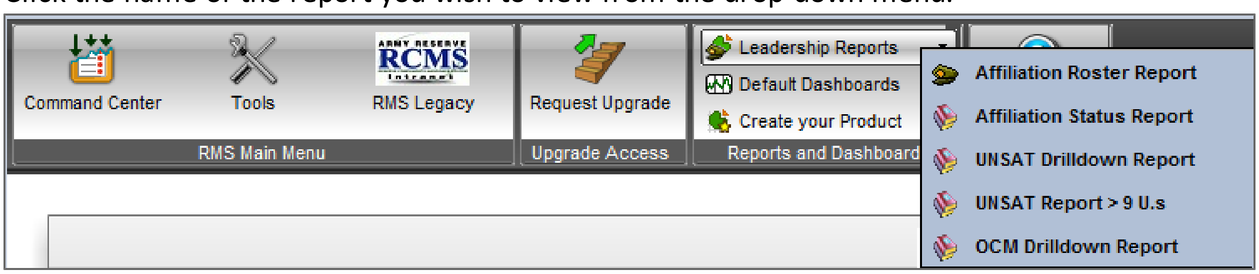
- *Pending*: This work bucket is populated when the user clicks the **Affiliate** button, but the Soldier's CURORG has not yet changed.
- *Contact Conflict*: This work bucket is populated when there is a mismatch between the "Soldier Contact Information" and the "TAPDB Contact Information" fields.
- *Welcome Letter Due*: This work bucket is populated when the Soldier has not yet been sent his/her Welcome Letter to the IRR Affiliation Program.
- *Annual Letter Due*: This work bucket is populated when the Soldier's affiliation anniversary is approaching, and needs to be sent an Annual Letter.

5.2 Leadership Reports

Leadership Reports are a collection of reports about the various applications within the RMS system, including "Affiliation Roster Report," "Affiliation Status Report," "UNSAT Drilldown Report," "UNSAT Report > 9 'U's, and "OCM Drilldown Report."

1. To access RMS Leadership Reports, click the Leadership Reports icon on the Ribbon Toolbar.

2. Click the name of the report you wish to view from the drop-down menu.



The report appears on the screen.

5.2.1 Explanation Of Different Leadership Reports

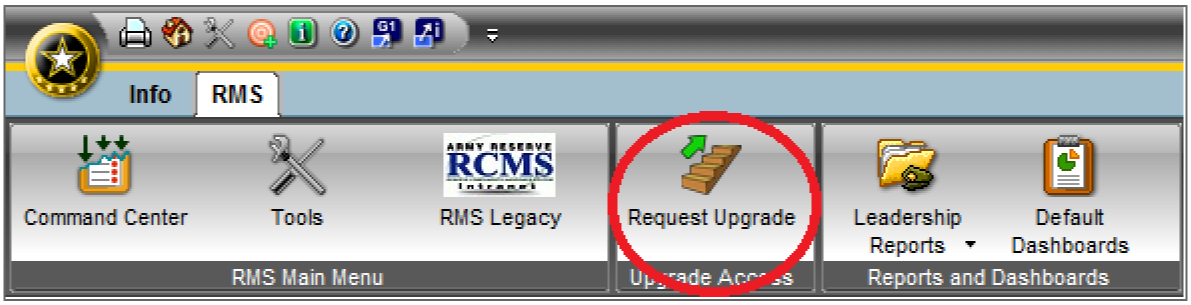
- Affiliation Roster Report: This report shows the status of each Soldier within a specific RSID which the user can view.
- Affiliation Status Report: This report shows the aggregate number of Affiliation Soldiers within a specific RSID, and allows users to drill down to a base report to view specific Soldier information.
- UNSAT Drilldown Report: This report allows users to drill down into a specific RSID to view information about UNSAT Soldiers.
- UNSAT Report > 9 'U's: This report allows users to view information about Soldiers who have recorded more than nine UNSATS ('U's)

- OCM Drilldown Report: This report allows users to view information about OCM Soldiers who are in specific statuses, including those Soldiers whose Civilian Education level is marked as "Green."

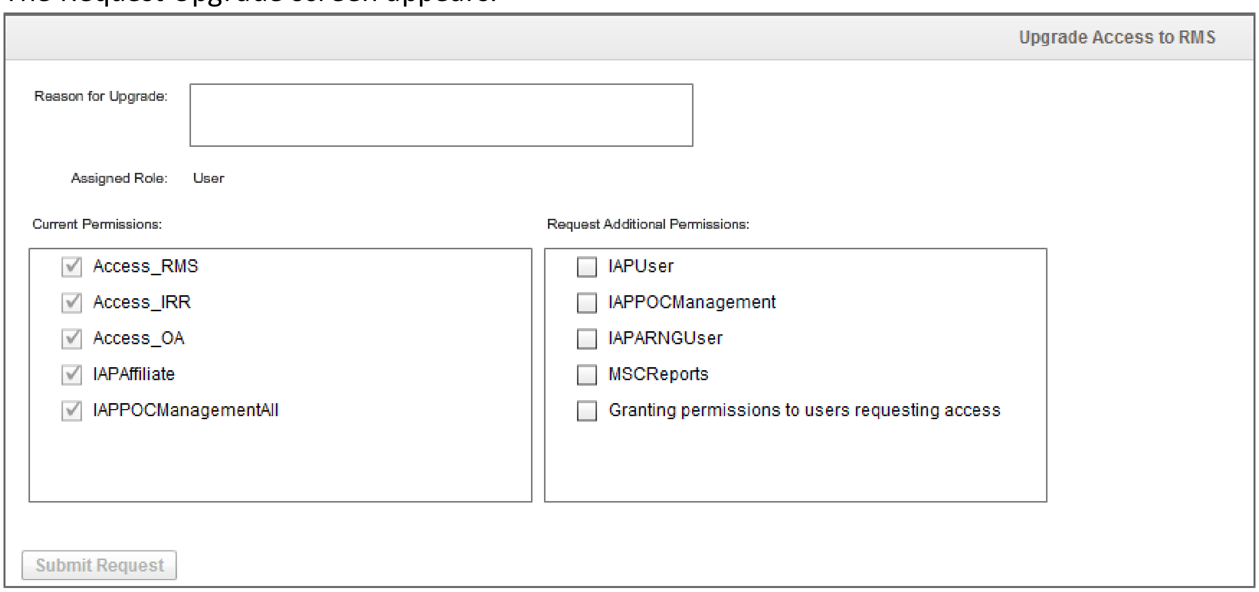
5.3 Request Upgrade

The Request Upgrade section of the application allows users to request additional permissions within RMS.

1. Click the **Request Upgrade** icon on the Ribbon Toolbar.



The Request Upgrade screen appears.



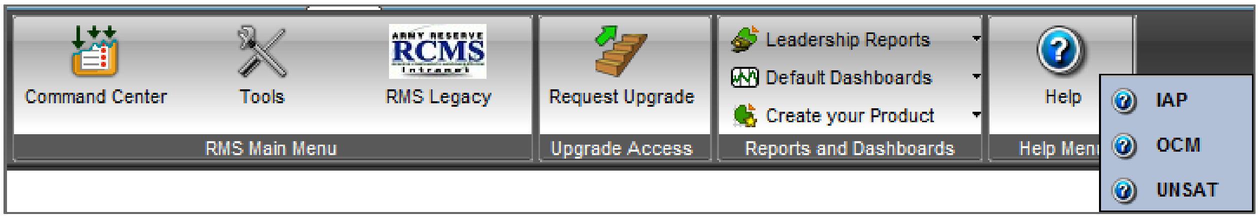
2. Fill out the “Reason for Upgrade” section and select the additional permissions you would like to receive on the right-hand side of the screen.
3. Click **Submit Request**.
   The request is submitted to the application manager, and you should receive a response to your request within a few days.

5.4 Tools

The Tools section is where you will manage the IRR Affiliation Program Unit POC Information. This information is automatically populated based upon the Units that are participating in the IRR Affiliation Program, and their Points of Contact.

5.5 Help

Click the Help icon in the Ribbon Toolbar in order to access the User Guides for each available module.



5.6 Contacting The Help Desk

Users can contact the Help Desk in one of two ways:

1. Call 1-800-339-0473.
2. Email Help@tibercreek.com

When contacting the Help Desk, please include the name of the application and a brief description of what you were doing before receiving an error message within the application.

6 Glossary Of Icons


Preferences: Click this icon to select which columns you want displayed in the report, along with how many records you want displayed per page.


Save Preferences: Click this icon to save the preferences you have selected.


Show/Hide Filter: Click this icon to toggle the display of filters.


Run Filter: Click this icon to execute the applied filters.


Clear Filter: Click this icon to remove any applied filters.


Print: Click this icon to print the displayed report.


Export to PDF: Click this icon to Export the report to PDF.

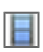

Export to Word: Click this icon to Export the report to Word.


Export to Excel: Click this icon to Export the report to Excel.


Refresh: Click this icon to refresh the information currently being displayed.


Show Full Screen: Click this icon to maximize the application window.


Help/Instructions: Click this icon to view available User Guides.


Video Guide: Click this icon to view available training videos.

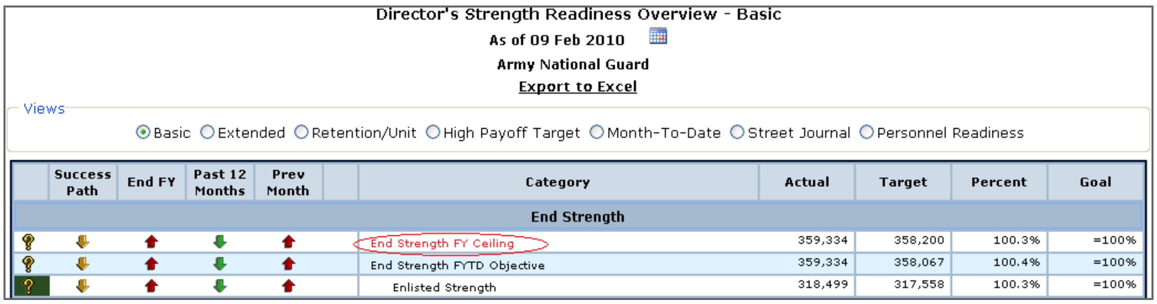

Close Current Tab: Click this icon to close the current tab.

7 Appendix A

All images and references within Appendix A are from the Director's Personnel Readiness Overview (DPRO) application.

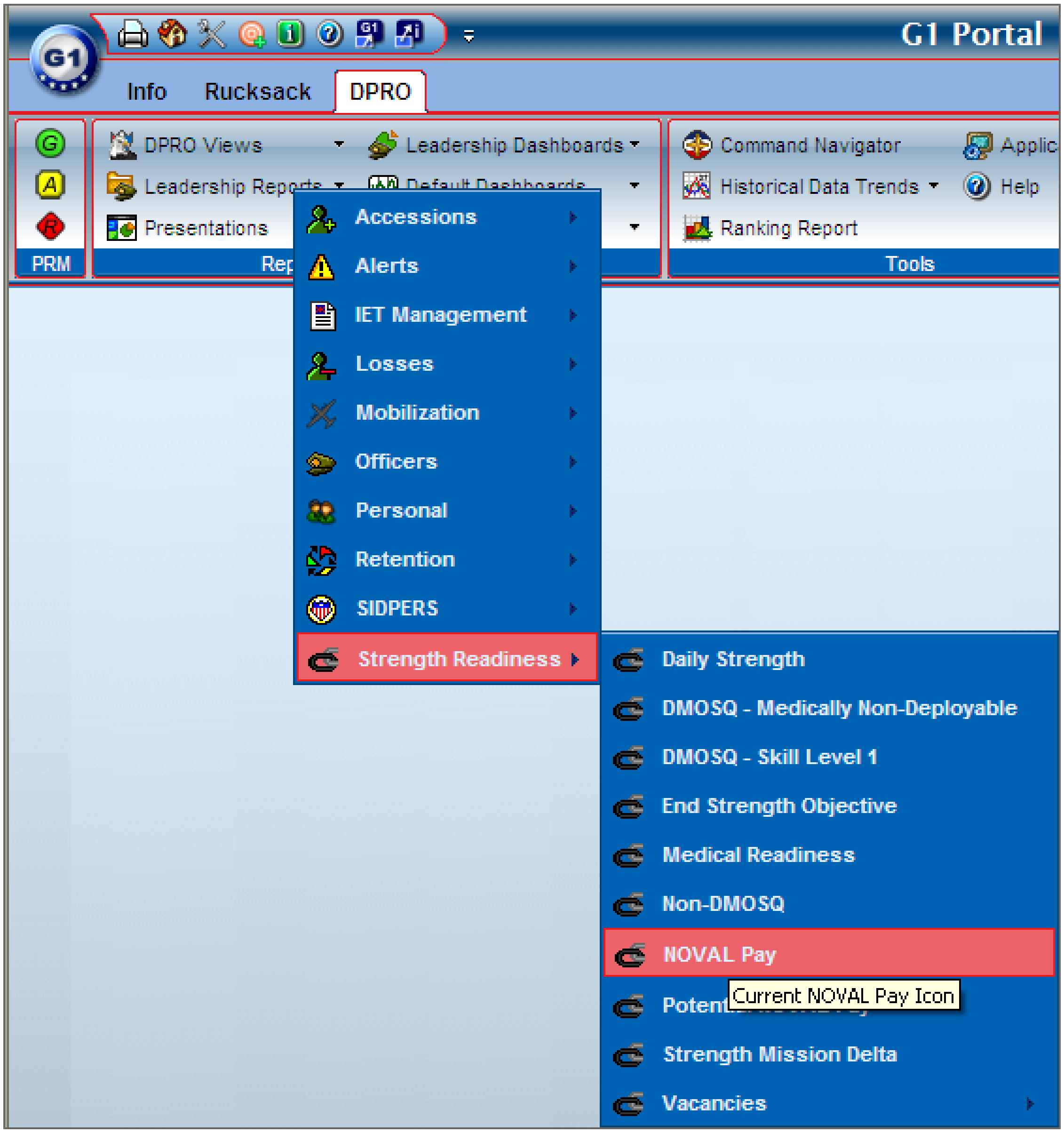
7.1 Reports

DPRO reports can be accessed via any of the DPRO views. Hover your mouse over the title of the report listed in the Category column and click the title.
The report will be displayed on the screen.

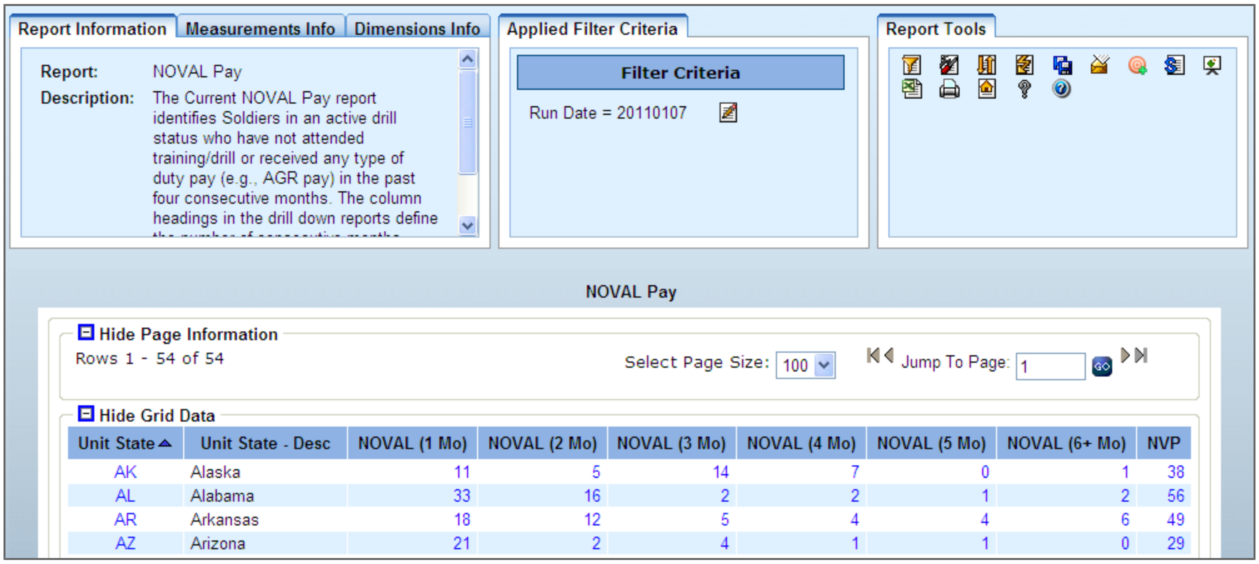


	Success Path	End FY	Past 12 Months	Prev Month		Category	Actual	Target	Percent	Goal
						End Strength				
						End Strength FY Ceiling	359,334	358,200	100.3%	=100%
						End Strength FYTD Objective	359,334	358,067	100.4%	=100%
						Enlisted Strength	318,499	317,558	100.3%	=100%

Another way to access a report is to select one of the Leadership Reports.



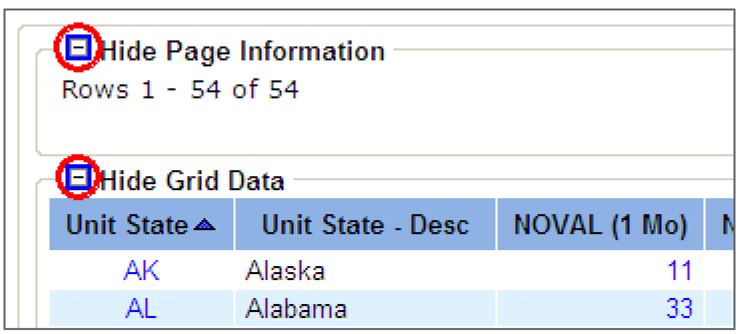
Click Leadership Reports and select a category from one of the report categories listed on the menu (for example, select Strength Readiness). Next, select a report (for example, NOVAL Pay). The report will be displayed on the screen.



Observing the entire screen, you will see three panels along the top of the screen below the main menu: Report Information, Applied Filter Criteria, and Report Tools.

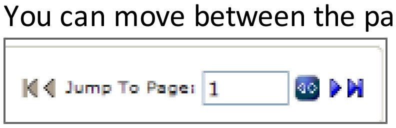
The Report is positioned in the center of the screen.

Focus on the report. You may expand or collapse portions of the report by clicking **Hide Page Information** or **Hide Grid Data**.



You can select a page size by choosing a number of records to be displayed on the screen from the **Select Page Size** drop-down menu.

You can move between the pages of the report by clicking the navigational arrows.



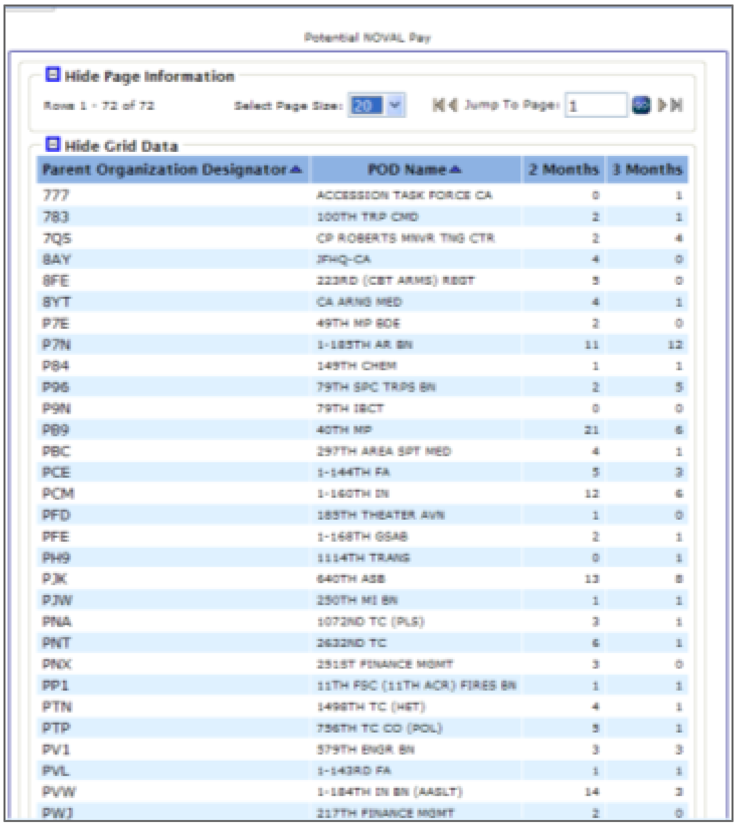
From left to right, the navigational arrows are

- Return to first page of the report
- Return to previous page of the report
- Go to next page
- Go to last page

You can also navigate through pages of the report by typing a page number in the “Jump to page” box and by clicking the **GO** button.

7.1.1 Drilling Down

Click a state’s abbreviation to drill down (we will use CA (California) as an example). Click the link to view more information at the POD (Parent Organization Designator) level.


Potential NOVAL Pay

Hide Page Information

Rows 1 - 72 of 72 Select Page Size: 20 Jump To Page: 1

Hide Grid Data

Parent Organization Designator	POD Name	2 Months	3 Months
777	ACCESSION TASK FORCE CA	0	1
783	100TH TRP CMD	2	1
7QS	CP ROBERTS MNVR TNG CTR	2	4
8AY	JFHQ-CA	4	0
8FE	223RD (CBT ARMS) REGT	5	0
8YT	CA ARNG MED	4	1
P7E	49TH MP BDE	2	0
P7N	1-185TH AR BN	11	12
P84	149TH CHEM	1	1
P96	79TH SPC TRPS BN	2	5
P9N	79TH IBCT	0	0
PB9	40TH MP	21	6
PBC	297TH AREA SPT MED	4	1
PCE	1-144TH FA	5	3
PCM	1-160TH IN	12	6
PFD	185TH THEATER AVN	1	0
PFE	1-168TH GSAB	2	1
PH9	1114TH TRANS	0	1
PJK	640TH ASB	13	8
PJW	250TH MI BN	1	1
PNA	1072ND TC (PLS)	3	1
PNT	2632ND TC	6	1
PNX	251ST FINANCE MGMT	3	0
PP1	11TH FSC (11TH ACR) FIRES BN	1	1
PTN	1498TH TC (HET)	4	1
PTP	756TH TC CO (POL)	5	1
PV1	579TH ENGR BN	3	3
PVL	1-143RD FA	1	1
PVW	1-184TH IN BN (AASLT)	14	3
PWJ	217TH FINANCE MGMT	2	0

From here, you can click a specific POD to drill into information about the UPCs for the chosen POD.

Hide Page Information

Rows 1 - 4 of 4 Select Page Size: 20 Jump To Page: 1

Hide Grid Data

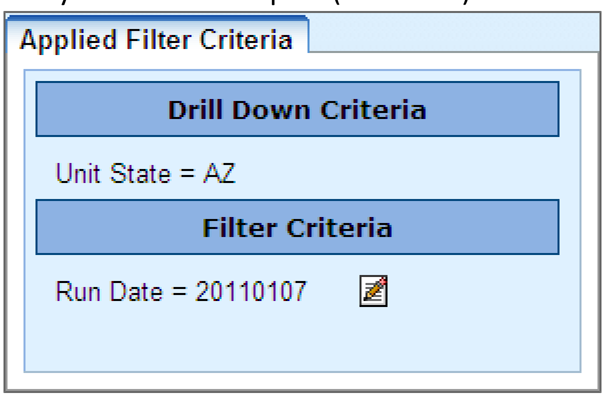
UPC	Unit Name	2 Months	3 Months
PCMA0	CO A 1-160TH IN	2	0
PCMB0	CO B 1-160TH INF	2	2
PCMC0	CO C 1-160TH IN	3	0
PCMT0	HHC 1-160TH IN	5	4
Total		12	6

Clicking the UPC yields the Soldiers for that UPC.

Hide Grid Data

Unit State	POD	UPC	Unit Name	Soldier Name	SSN	SSN4	Grade	DMOS	Gender	ETS Date	Months Non-Participation	PEBD	Last Drill Date
CA	778	77804	CA ARNG TRAINING SITE DET	[redacted]						20140727	3	19930728	20110108

Note the second of the three panels running across the top of the screen. This panel displays the primary filter on the report (Run Date) as well as the drill-down criteria applied to this point.



7.1.2 Base Reports

7.1.3 Report Information Panel

The panel on the far left of the screen contains report information, as well as dimensions and measurements information.

The **Report Information** tab provides the title and a short description of the report, the source of the data, and the date the data was retrieved from the source. The **Measurements Info** and **Dimensions Info** tabs describe each column of the report.

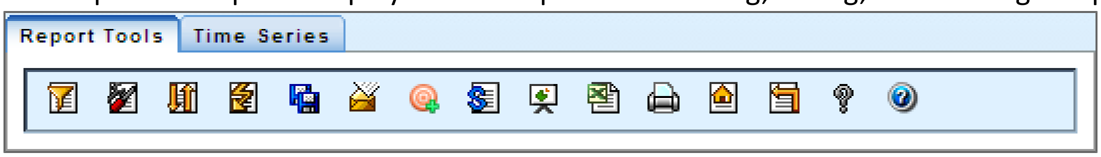
Dimensions and measurements information can be also obtained by hovering over the dimension (or measurement) columns.

7.1.4 Applied Filter Criteria Panel

The panel in the middle of the screen, Applied Filter Criteria, reflects the current filter on the report. Any additional filters will be added to this list. Similarly, as you drill further into the details, the drill-down criteria will be displayed within this panel.

7.1.5 Report Tools Panel

The Report Tools panel displays various options for editing, saving, and viewing a report.

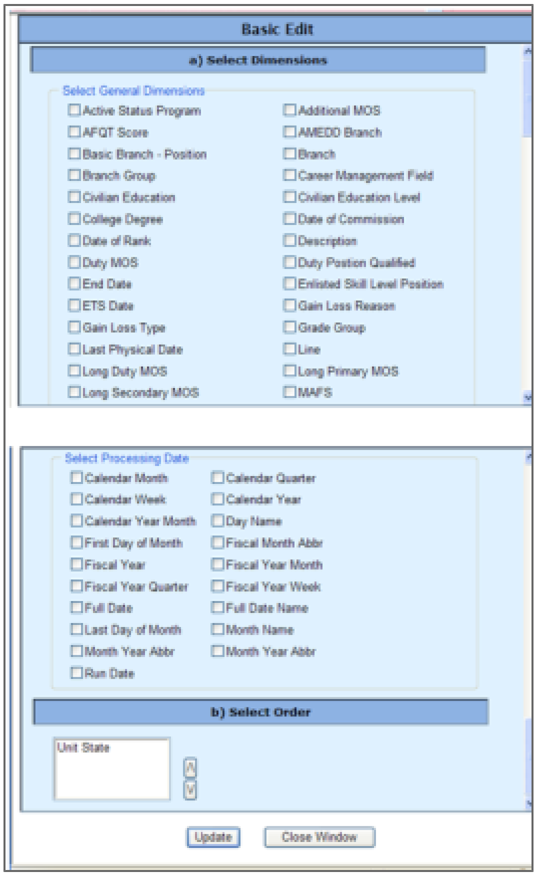


Explore any of the following topics to learn more:

7.1.5.1 Basic Edit Report

In the Report Tools panel, click the **Basic Edit Report** icon .

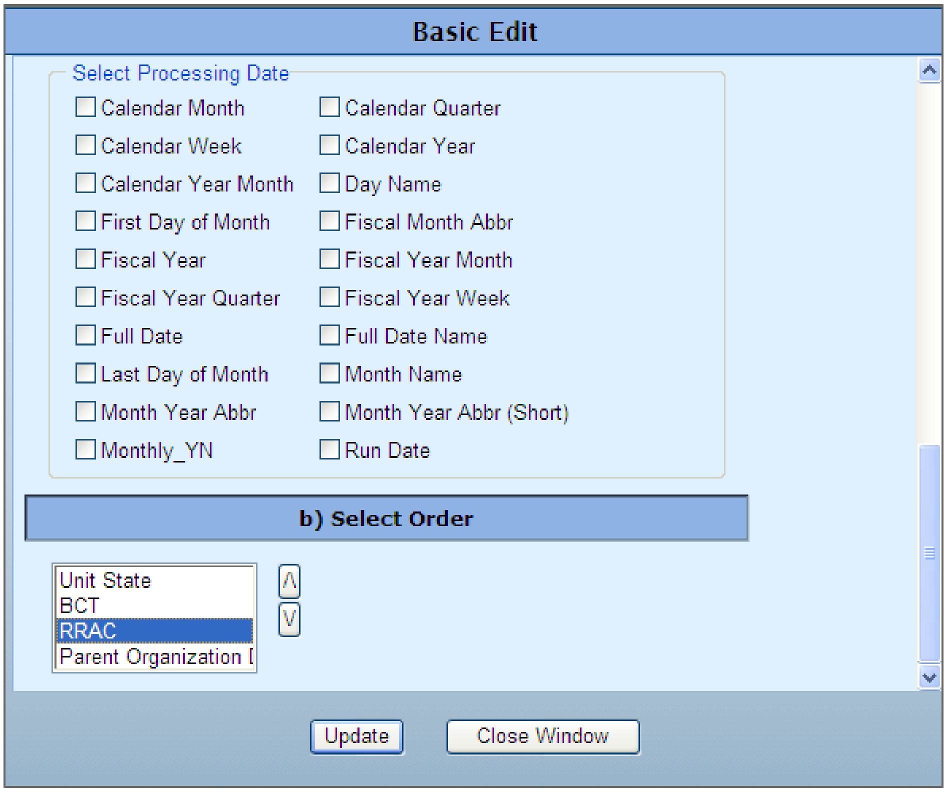
A Basic Edit menu opens.



Select one or more dimensions on which to generate the report. Scroll down to view all available dimensions.

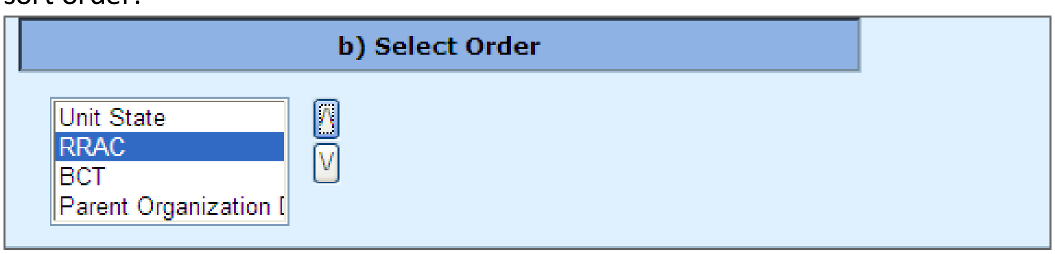
The default dimension is Unit State – it is pre-selected in the Select Order box. To add dimensions to the report, select the boxes next to the dimensions you would like to add. In this example, Parent

Organization Designator, RRAC, and BCT have been selected.

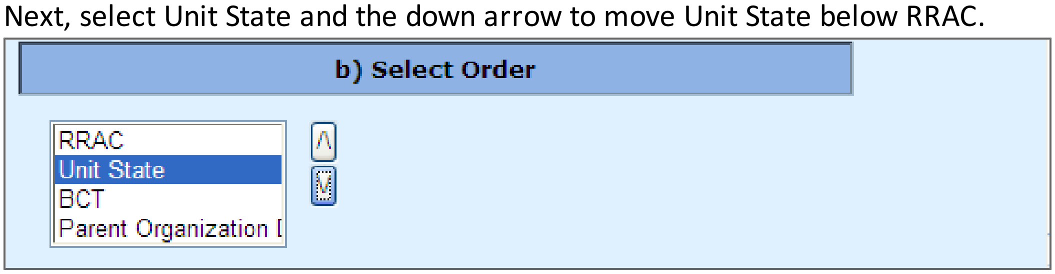


The dimensions will appear in the Select Order box in order of user selection. Use the up/down arrows next to the Select Order box to indicate the preferred sort order of the report.

For example, select RRAC within the Select Order box. Click the up arrow to move RRAC higher in the sort order.

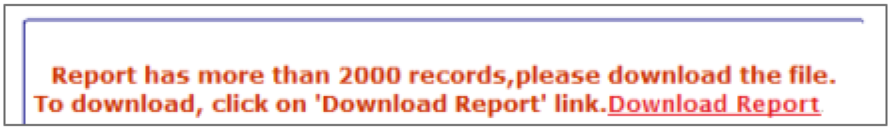


Next, select Unit State and the down arrow to move Unit State below RRAC.



Click the **Update** button and view the report showing the newly added dimensions.

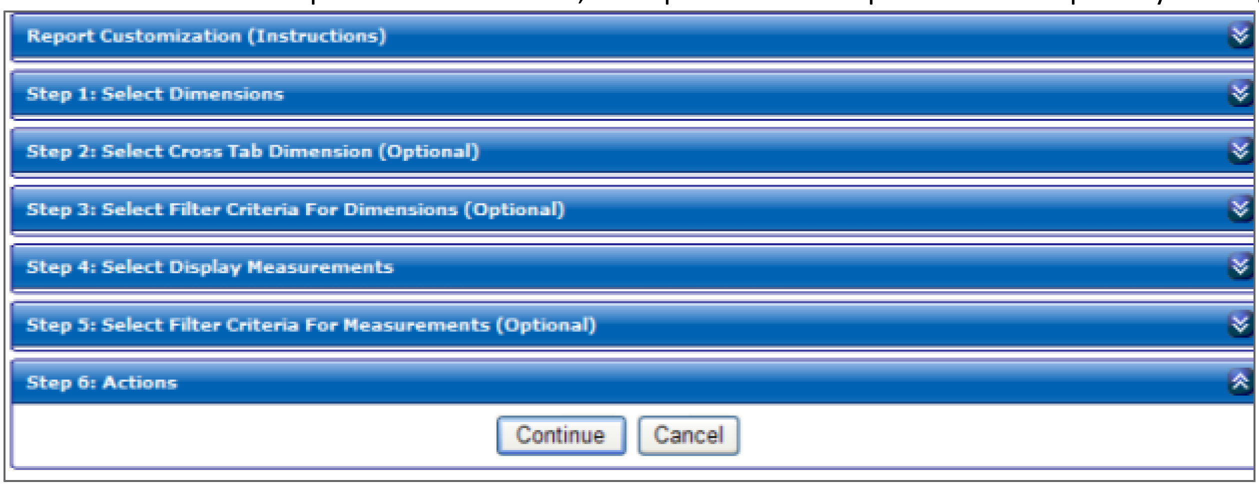
In cases where a resulting report has more than 2000 records, the report will not be displayed on the screen. Instead, a notification will deploy stating that the report has more than 2000 records. Click the **Download Report** link to download a local copy of the report.



7.1.5.2 Advanced Edit Report

In the Report Tools panel, click the **Advanced Edit Report** icon.

You will see seven new panels on the screen; each panel can be expanded or collapsed by clicking it.

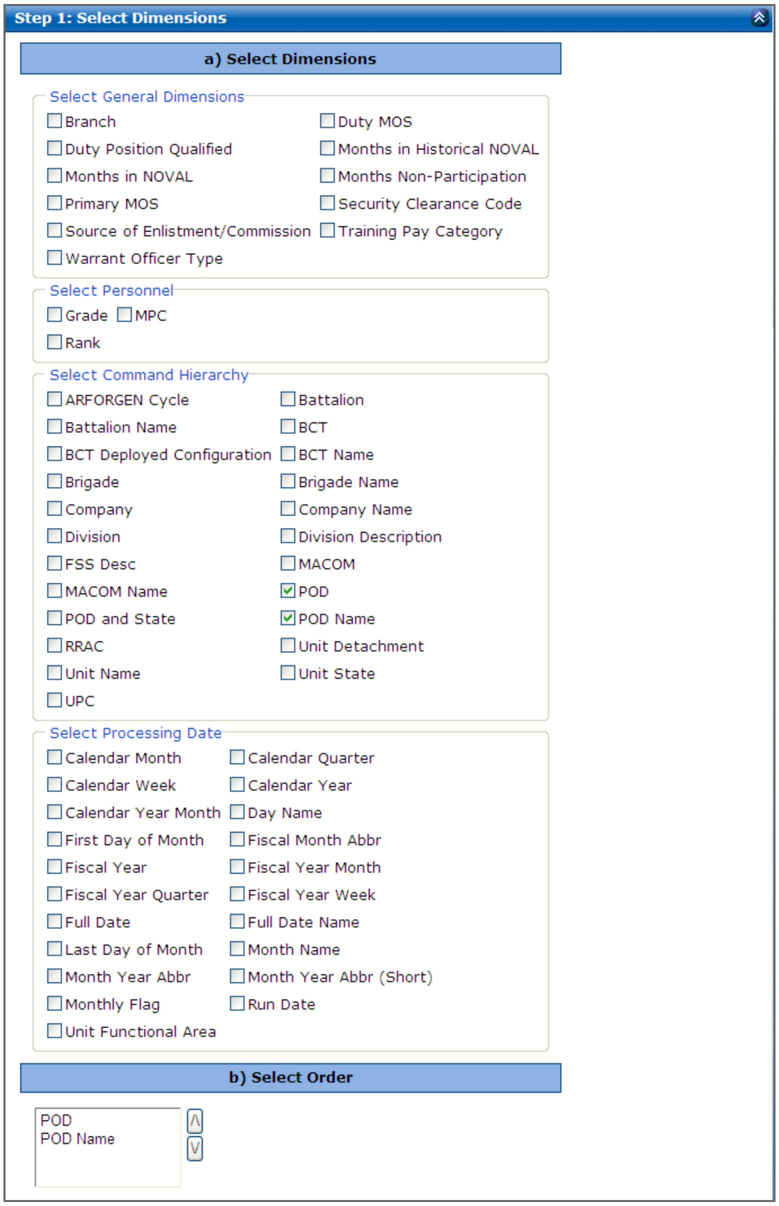


The first panel, Report Customization, offers basic instructions for running a report with advanced edits. Note that Steps 2, 3 and 5 are optional. At any point of the report editing, click the **Continue** button in Step 6 (Actions panel) to view the results of the editing performed so far.

Report Customization (Instructions)

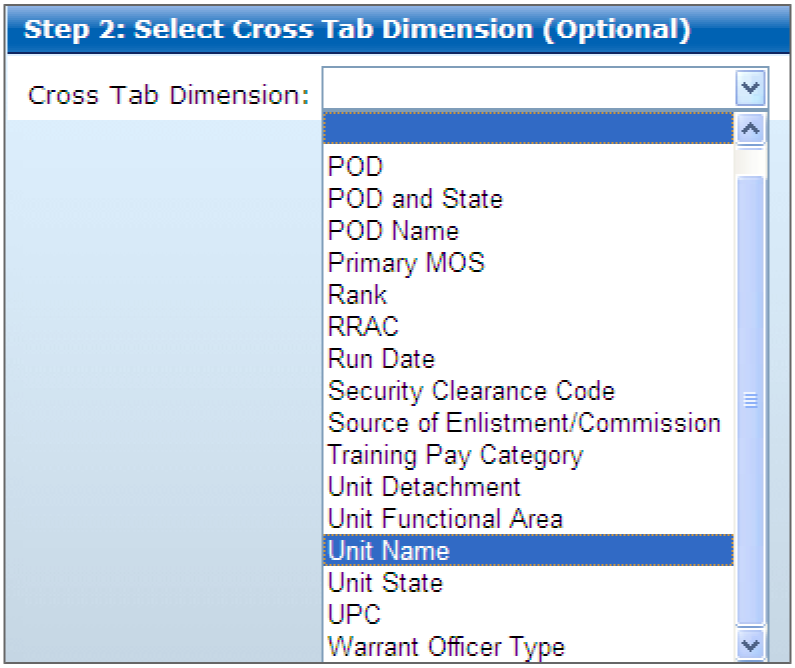
1. Select Dimensions.
    - Data in this report may be summarized by dimensions listed inside the Step 1 panel. Place a check mark next to each dimension you wish to see displayed in your report. Upon selection, the dimension will appear in the box below the list of dimensions. The dimensions will appear on the report in the order in which they appear in this box. To alter this order, select the dimension and use the up and down arrows.
    - To change the display order of the dimensions, click on a dimension in the box and then click on either the up or down arrow to the right to sort up or down.
2. Apply Filter Criteria for Dimensions
    - You may filter report data by specifying criteria on dimensions.
3. Select Cross Tab
    - You may create a cross tab report by selecting one dimension that is not selected in step 1.
4. Select Measurements.
    - You may select more than one measurements.
    - For selected measurements, specify preference for totals as desired.
5. Apply Filter Criteria for Measurements
    - You may filter report data by specifying criteria on measurements.

You are instructed to open the panel for Step 1, Select Dimensions.

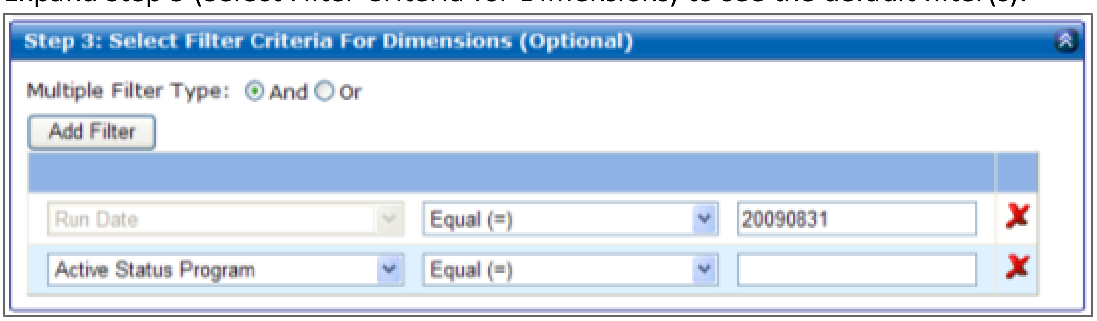


This panel looks identical to the pop-up menu for the Basic Edit Report. Select dimensions from the menu and the order in which they should be displayed on the resulting report. (For more details on how to select dimensions and order them, please see the Basic Edit Report on page 39 section).

Next, expand Step 2 (Select Cross Tab Dimension), if desired, and choose one of the items from the drop-down menu. In our example, Unit Name is selected.



Expand Step 3 (Select Filter Criteria for Dimensions) to see the default filter(s).



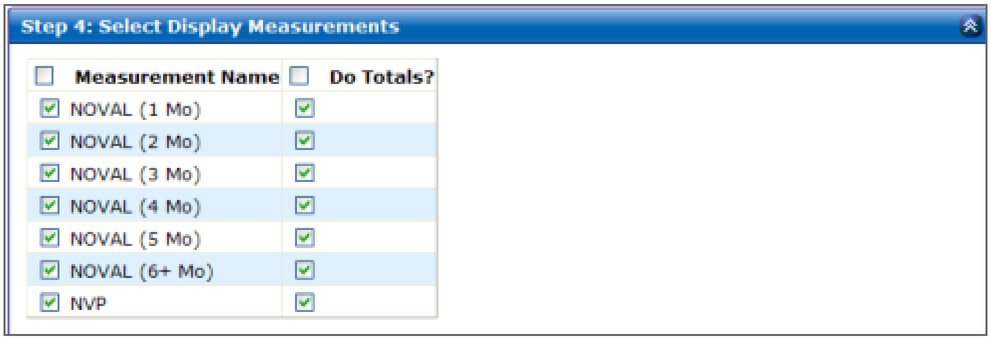
From here, you can change the currently selected Filters, Filter Operators and Filter Values.

Enter the Filter Value without quotes; check either the “And” or “Or” radio button to either combine or render mutually exclusive your newly created filtering conditions.

Click the **Add Filter** button to add a filter.

Click the red **X** icon to delete a filter.

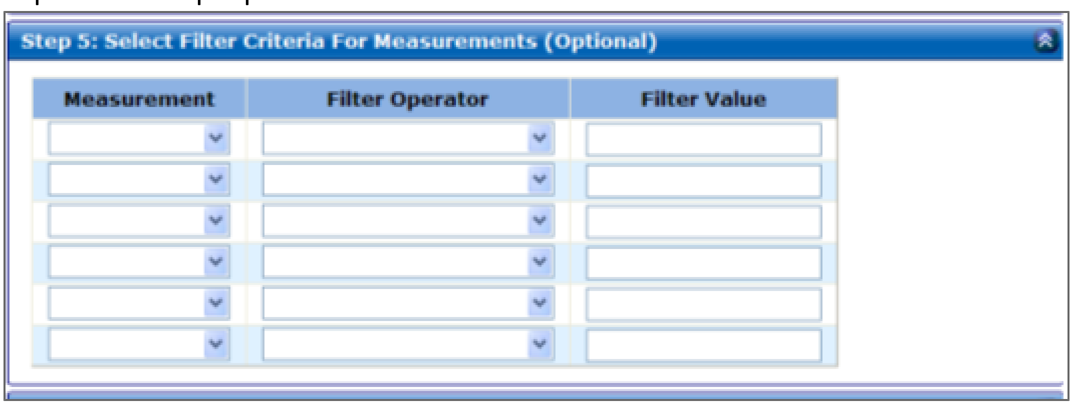
The Step 4 panel allows you to Select Display Measurements.



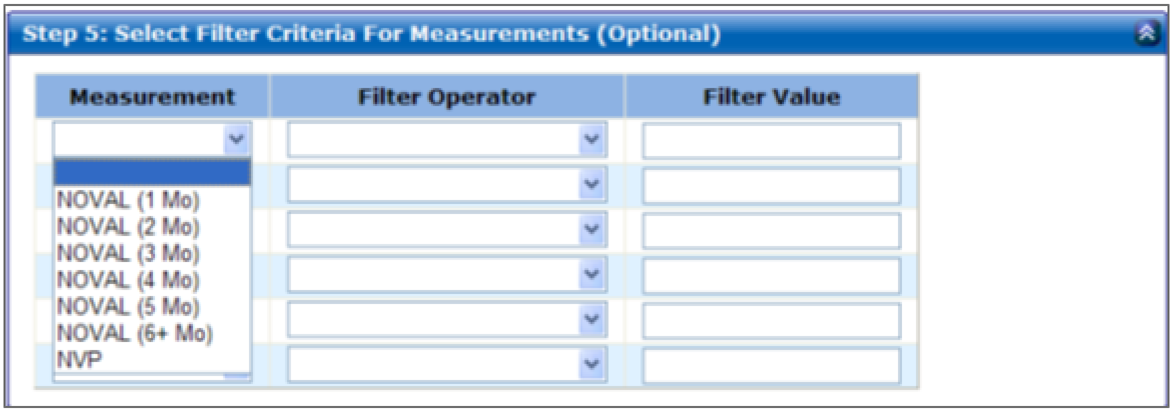
The defaults for the current report (NOVAL Pay) have been selected to have their totals displayed.

The “Measurement Name” check box allows for the selecting or de-selecting of all measurements at once. The “Do Totals?” check box is for the selecting or de-selecting of all measurement summaries at once.

Expand the Step 5 panel to Select Filter Criteria For Measurements.

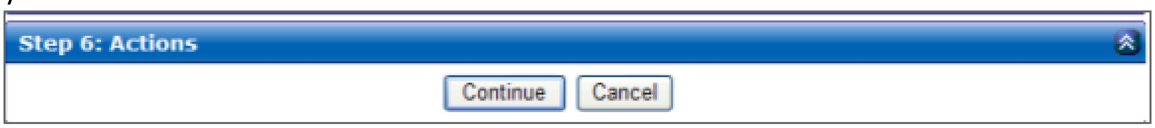


This step allows you to filter the report on one or more of the currently selected measurements. Notice that measurements listed in the Measurement drop-down menu represent columns of the report being edited (NOVAL Pay).



Use drop-down menus to select the measurements and filter operators. Input the filter values.

After all of the necessary selections have been made, click the **Continue** button to view the results of your selections.



7.1.5.3 Sort The Report

To view available options for sorting this report, click the **Sort the Report** icon in the Report Tools panel .

A pop-up window is displayed showing the current Sort order. To change the Sort order, simply choose another option from the drop-down menus.

7.1.5.4 Go To Base Report

In the Report Tools panel, click the **Go To Base Report** icon to view

7.1.5.5 Save Report As

Save any report under a name that is intuitive. This is done by clicking the **Save Report As** icon in the Report Tools panel.

The *Save Report Options* window opens.

A drop-down menu permits you to define a Report Type of either *My Report* or *Shared Report*.

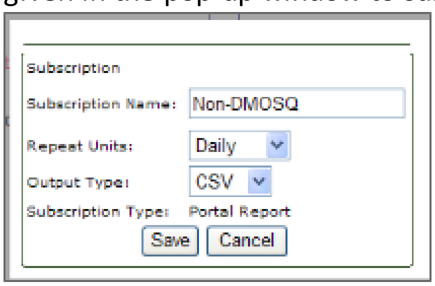
In either case, you type in the report name and click the **Save Report** button to save the report.

7.1.5.6 Email This Report

In the Report Tools panel, click the **Email This Report** icon to email the report.

7.1.5.7 Subscribe To This Report

In the Report Tools panel, click the **Subscribe to this Report** icon and follow the simple instructions given in the pop-up window to subscribe to the report.



7.1.5.8 Add S-Report

To create and add an S-report, click the **Add S-Report** icon in the Report Tools panel.

The following pop-up window appears, allowing for the selection of S-report measurements.

Click the **Create S-Report** button.
The report opens.

7.1.5.9 View Report Data In Dashboard Format

In the Report Tools panel, click the **View Report Data In Dashboard Format** icon to view the report as a collection of dashboards.

7.1.5.10 Export Report Data To Excel

In the Report Tools panel, click the **Export Report Data to Excel** icon and follow the instructions in the window to export the report to a Microsoft Excel spreadsheet.

7.1.5.11 Print Report

Make certain the work station or computer is connected either directly to a printer or is able to reach a networked printer. In the Report Tools panel, click the **Print Report** icon to send the report data directly to a printer.

7.1.5.12 Report Home Page

In the Report Tools panel, click the **Report Home Page** icon to return to the default report page.

7.1.5.13 Go To Previous Page

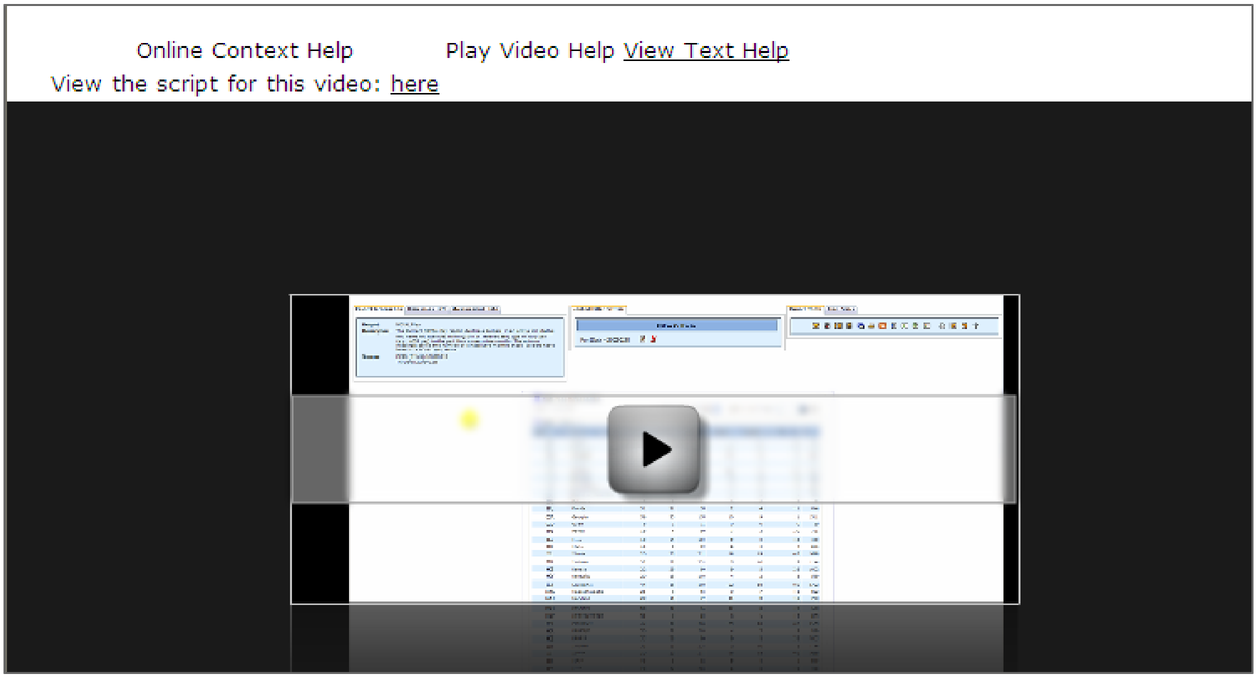
In the Report Tools panel, click the **Go to Previous Page** icon to go back one screen.

7.1.5.14 Report Help

In the Report Tools panel, click the gray question mark, the **Report Help** icon.
An ancillary window will open with drop-down Dimension and Measurement lists containing the specific dimensions and measurements located in the report you are viewing.

7.1.5.15 Help

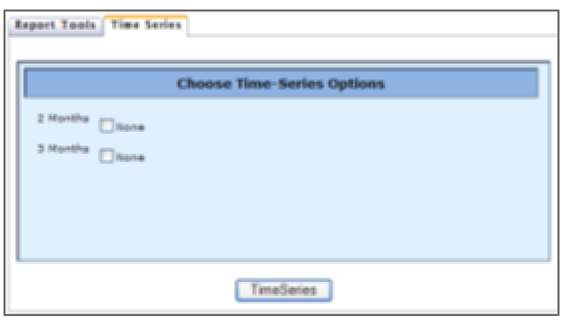
In the Report Tools panel, click the second question mark, the **Help** icon.
An ancillary Help window with Online Context Help opens.



From here, play a Video helping with the topic, read the script that supports the video, or view the full Text Help document.

7.1.5.16 Time Series

The **Time Series** tab allows for the addition of Time-Series for each of the measurements, as applicable.

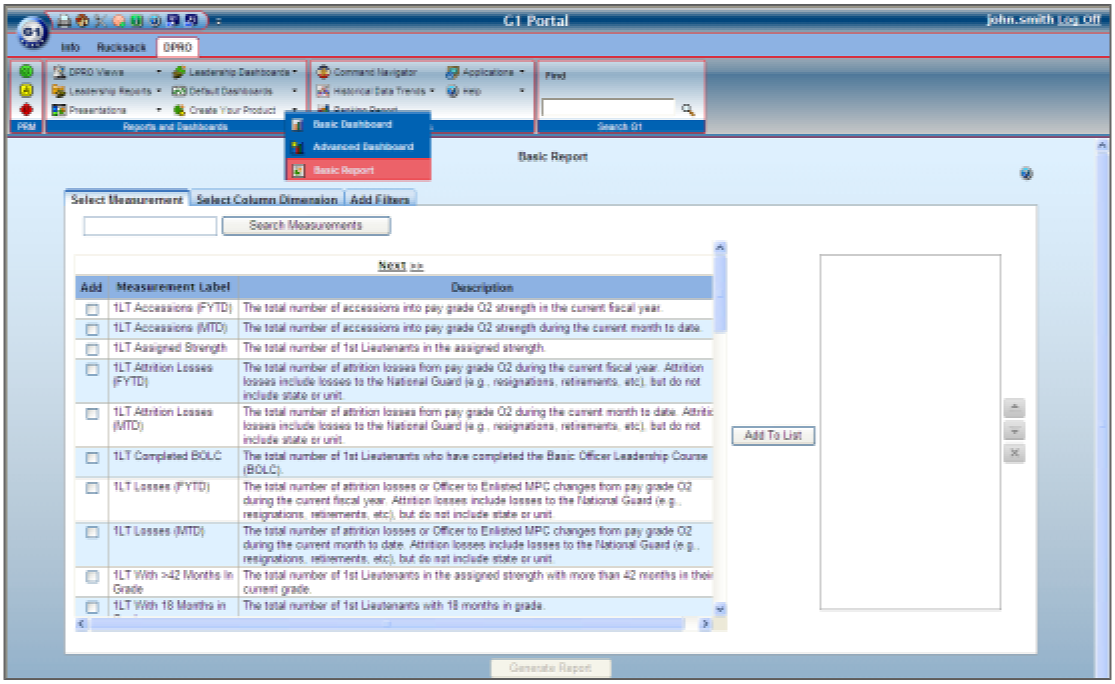


7.1.6 Basic Report

The Basic Report option, found within the Create Your Product menu, allows you to create your own reports consisting of measurements, dimensions, and even filters. After creating a report, you are then able to subscribe to it so that you consistently receive only the information that is pertinent to you.

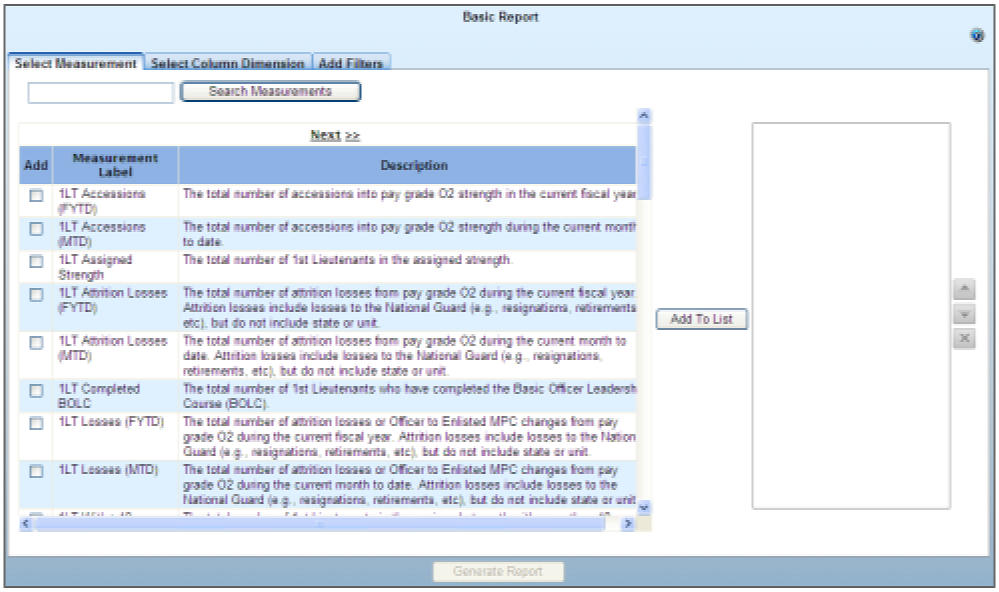
7.1.6.1 Creating A Report

1. Click **Basic Report** in the Create Your Product drop-down menu.
   The Basic Report screen appears.



7.1.6.2 Select Measurements

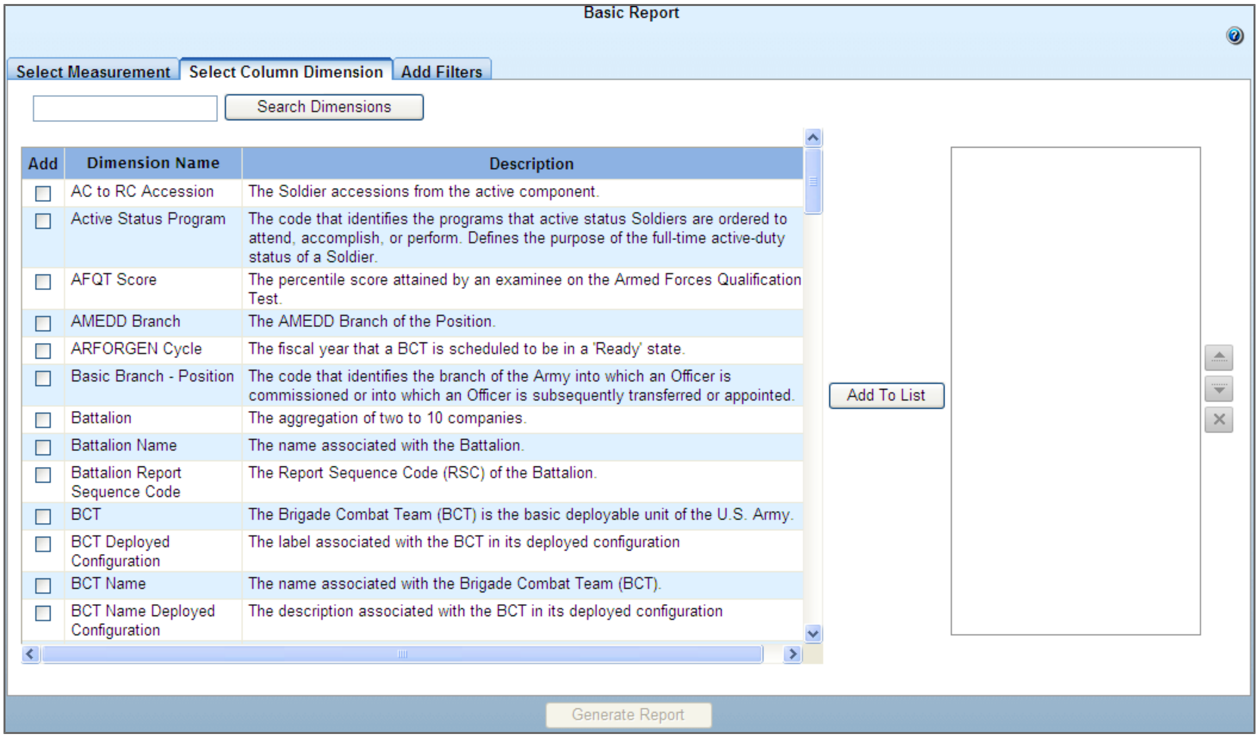
1. Type a measurement into the text box and click the **Search Measurements** button.
   A list of measurements containing the search term appears on the screen.
   OR
   Select one (or more) measurements from the list available, and click the **Add To List** button.
   The selected measurements appear in the list.



2. The order the measurements appear in the list is the order in which they will appear as columns in the created report.
3. To reorder the selected measurements, select a measurement and click the up or down arrow next to the list.
4. To delete a measurement, select the measurement and click the X next to the list.

7.1.6.3 Select Column Dimensions

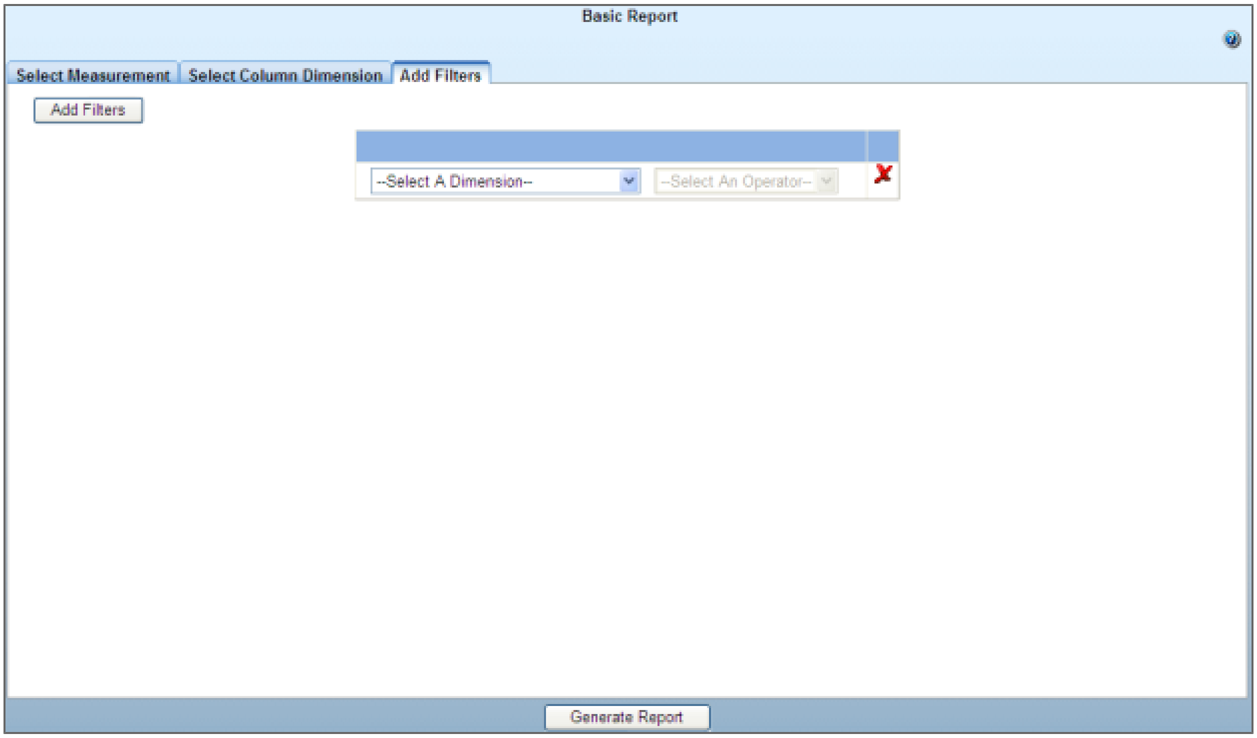
1. Click **Select Column Dimensions**.
   The tab appears.



2. Type a dimension into the text box and click the **Search Dimensions** button.
   A list of dimensions containing the search term appears on the screen.
   ORSelect one (or more) dimensions from the list available, and click the **Add To List** button.
   The selected dimensions appear in the list.
3. The order the dimensions appear in the list is the order in which they will appear as columns in the created report.
4. To reorder the selected dimensions, select a dimension and click the up or down arrow next to the list.
5. To delete a dimension, select the dimension and click the X next to the list.

7.1.6.4 Add Filters

1. Click **Add Filters**.
   The tab opens.



2. Choose a dimension from the available drop-down menu.
3. Select an operator by which you can choose what kind of data to view.
4. Select the values you which to view in the report.
5. Click the **Add Filter** button to add another filter to the report.

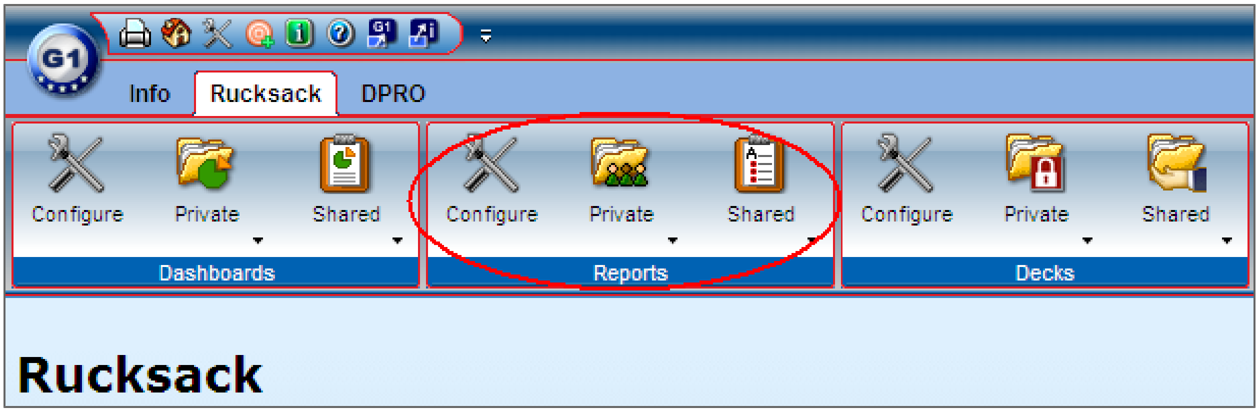
7.1.6.5 Generating And Viewing The Report

1. Once you have made your selections for Measurements, Dimensions, and, optionally, Filters, click the **Generate Report** button.
   The generated report is shown on the screen.
2. Add or Remove Measurements (), Dimensions (), or Filters () by clicking the appropriate icon in the Report Tools section of the screen.

Note: From the Report Tools section, you can also save the report, email the report, subscribe to the report, export the report to Excel, print the report, or view help documentation about the metrics and dimensions contained within the report, or about the Basic Report tool itself.

7.1.6.6 Editing A Report

1. Click the **Rucksack** tab.



2. Depending on whether you saved the report as Private or Shared, click the appropriate button under the Reports section.
3. From the drop-down list that appears, select the report you wish to edit.
   You will be taken to the main screen of the report.
4. From here, you can add or remove Measurements, Dimensions, or Filters for the report.
5. After making changes to the report, you can save it again, email the report, subscribe to the report, export the report to Excel, print the report, or view help documentation about the report's data or the Basic Report tool itself.

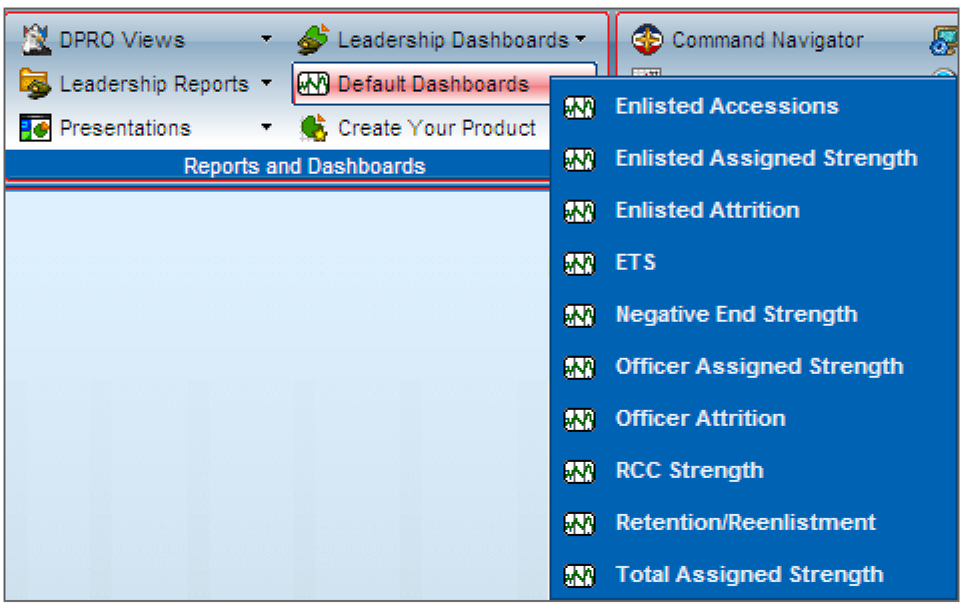
8 Appendix B

All images and references within Appendix B are from the Director's Personnel Readiness Overview (DPRO) application.

8.1 Dashboards

Dashboards are located on the main DPROpage within the Reports and Dashboards section. Note there are three Dashboard options: Leadership Dashboards, Default Dashboards, and Create Your Product (which contains Basic Dashboard and Advanced Dashboard). The example is taken from one of the Default Dashboards (Enlisted Accessions), though the functionality of all other Dashboards remains basically the same throughout the application.

Mouse over and click the **Default Dashboards** button to see the drop-down list of available pre-set dashboards.

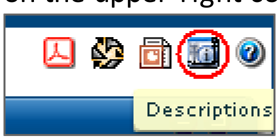


The selectable dashboards include Detrimental to End Strength, Enlisted Accessions, ETS, Officer Accessions, and RCC Strength, among others. Note that as you mouse over the list each item highlights in red. For this demonstration, select **Enlisted Accessions**.

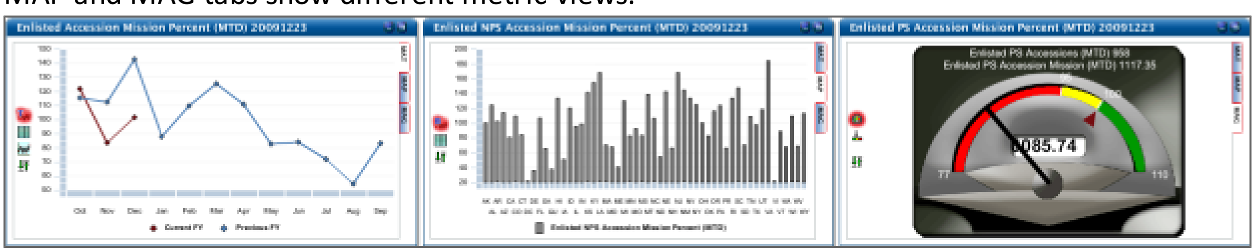
8.1.1 Common Elements Within Dashboards

A Dashboard, a collection of one or more Metric Boxes, appears on the screen. Here the dashboard is comprised of six metric boxes. The title of each metric box appears in its upper-left corner in the title bar. Some definitions of terminology: a metric box is a container for a metric box element. A metric box element is any of several visual representations used to display a measurement.

To read a description of each metric box within a given dashboard, click the **Descriptions** icon located on the upper-right corner of a dashboard.



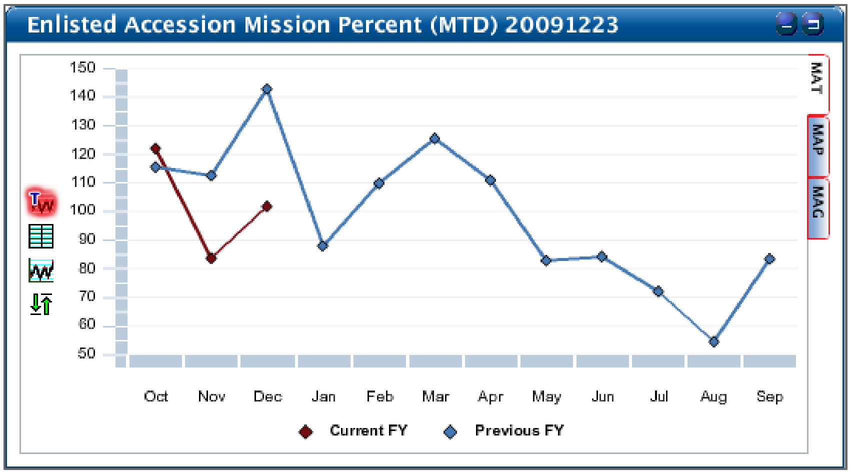
There are a number of ways metrics can be displayed on a dashboard. First, notice that clicking MAT, MAP and MAG tabs show different metric views.



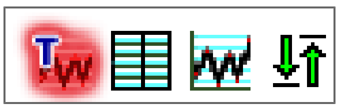
- MAT tab represents Metric Across Time
- MAP tab represents Metric Against Peers
- MAG tab represents Metric Against Goal

Further, notice that metrics within each tab can also be viewed in a number of ways.

For example, look at the Enlisted Accession graph in a MAT tab.



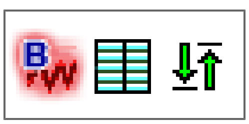
Next to the graph are a number of metric box element icons. Hover over each icon to see what it represents.



Currently available views (seen left to right above) are

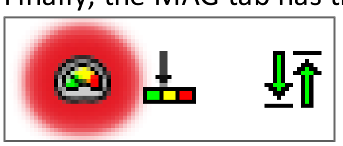
- Comparative Trend Chart
- Comparative Trend Data
- Historical Trend Chart
- Drill Down Report

The same Enlisted Accessions graph in MAP tab has the following available Element.



- Benchmark Chart
- Benchmark Data
- Drill-Down Report.

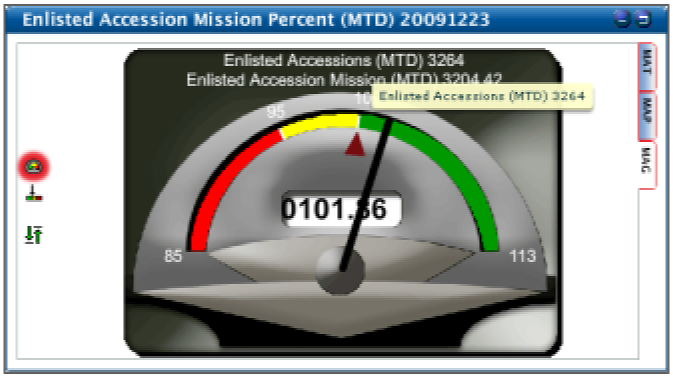
Finally, the MAG tab has the following options to view the Officer Accessions metric.



- Gauge
- Horizontal Slide Scale
- Drill Down Report

8.1.1.1 Gauge View

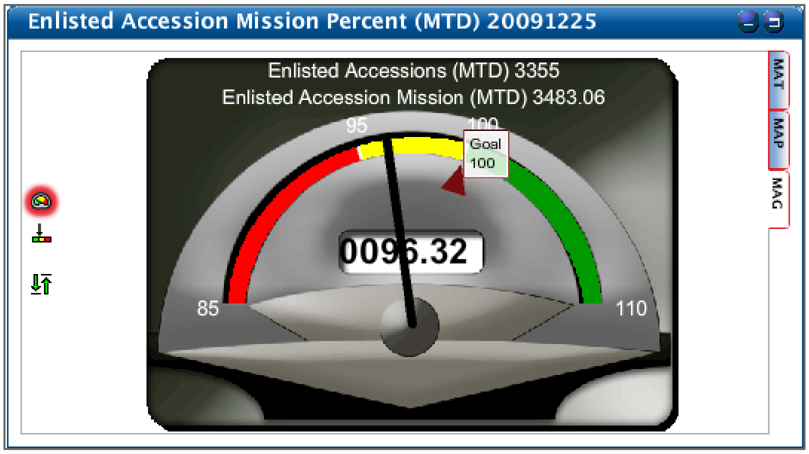
Look at one of the metric boxes (for example, Enlisted Accession Mission Percent (MTD)) located on the right side of the dashboard (MAG tab). The metric box element displayed here is a Gauge.



The numerical value in the center of the meter is the count of what is listed in the gauge's title. In the following example, for instance, the measurement is Enlisted Accession Mission Percent (MTD) as of 25 December 2009, and the numerical value in the meter is 96.32. The red portion of the meter represents "Bad scale" of this measurement, yellow portion represents "Fair scale" and green portion represents "Good scale." As you can see in the meter, the value (96.32) corresponds to a "Fair scale" range. As you move your mouse through the colors you will see the numerical values range for each portion of the meter.

Point your mouse toward a brown triangle on the right side of the meter. The triangle indicates Mission data. A pop-up window will provide you with a numerical value of the Mission.

For example, the Enlisted Accession Mission Percent (MTD) goal equals 100.



Note the three small icons in the upper-right corner of the title bar.

These are “minimize” and “maximize” icons; the question mark is a link to help with the page. Click the left (**Minimize**) icon: the metric box shrinks and relocates as a title bar to the lower-left corner of the screen.

The remaining five metric boxes expand to fill the dashboard. To restore the box, simply click the title bar of the minimized metric box.

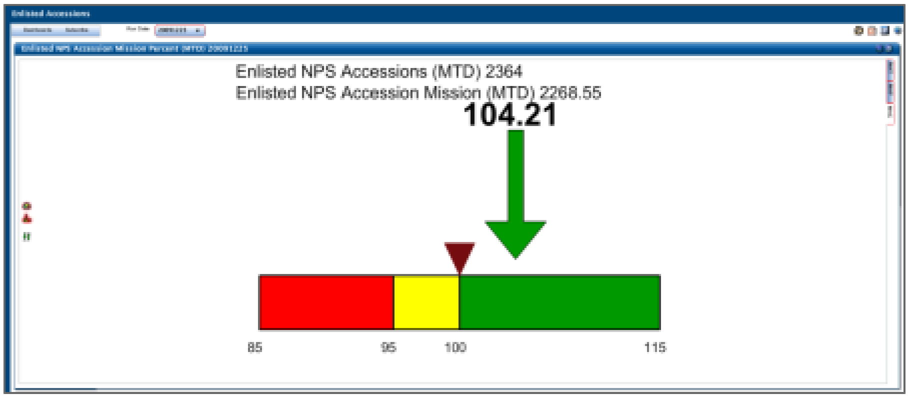
Click the **Maximize** icon to enlarge the gauge – the resulting maximized gauge will expand to fill the screen.

Notice that the second icon in the upper-right corner has changed from the **Maximize** icon to the **Restore Down** icon.

Click this icon to restore the metric box to its original size.

8.1.1.2 Horizontal Slide Scale View

Click the Horizontal Slide Scale View – it is available within the MAG tab. As with the Colored Gauge view, the red portion of the Slide Scale represents "Bad scale" of the metric, yellow portion represents "Fair scale" and green portion represents "Good scale". As you move your mouse through the colors you will see the numerical values range of each portion of the scale.

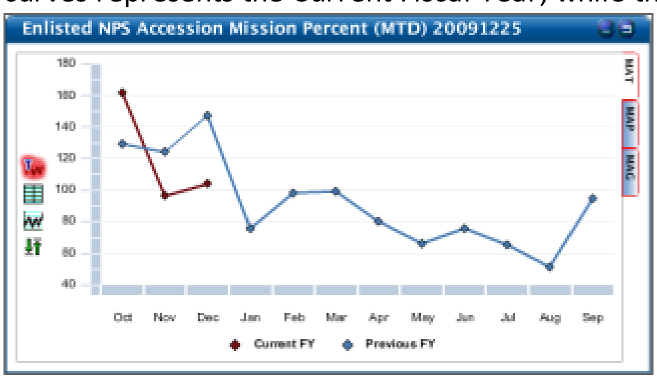


The value in the Horizontal Slide Scale (104.21) corresponds to a "Good scale" range.

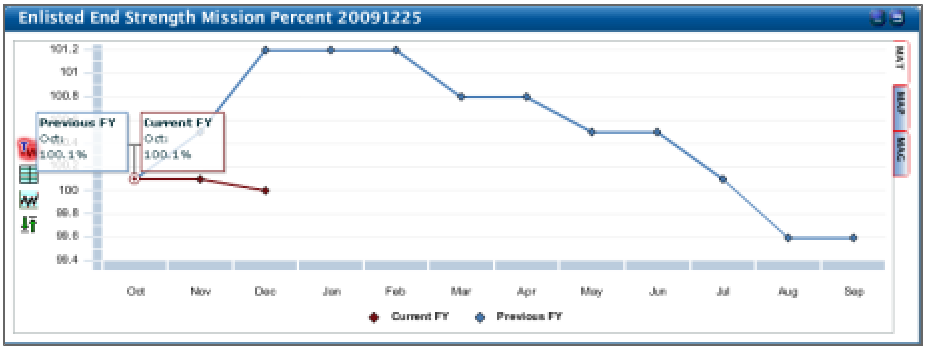
As with the Colored Gauge view, the brown triangle indicates Mission data. Point your mouse towards the triangle to see the numerical value of the Mission.

8.1.1.3 Comparative Trend Chart View

Select the **Comparative Trend Chart View**. This view is available within the MAT tab. One of the curves represents the Current Fiscal Year; while the other represents the Previous Fiscal Year.

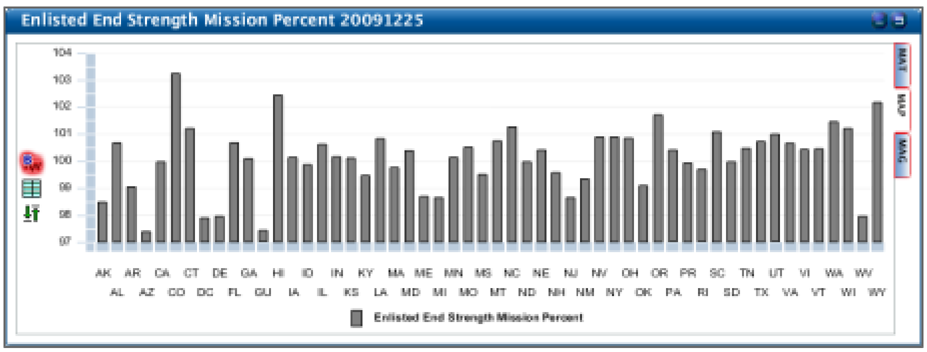


Hover over a point on either of the two trends to see the count for that month and Fiscal Year (Current or Previous).

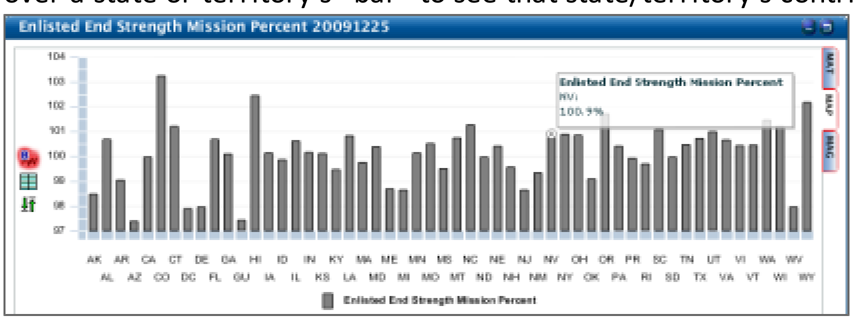


8.1.1.4 Benchmark Chart View

Next, select **Benchmark Chart View**. This view is available within the MAP tab.

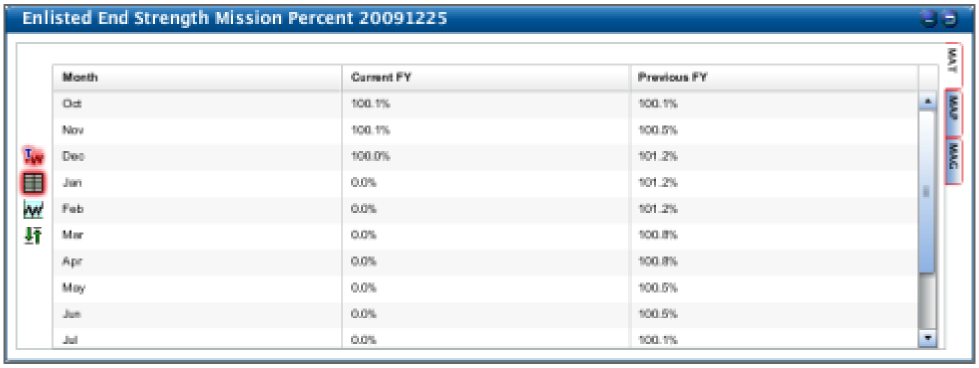


This shows the contributions by individualstates and territories to the overall measurement. Hover over a state or territory’s “bar” to see that state/territory’s contribution.



8.1.1.5 Data Grid Views

Data Grid views are available as Trend Data in the MAT tab, Benchmark Data in the MAP tab, and Drill-Down Report in the MAG tab (Trend Data is shown below).

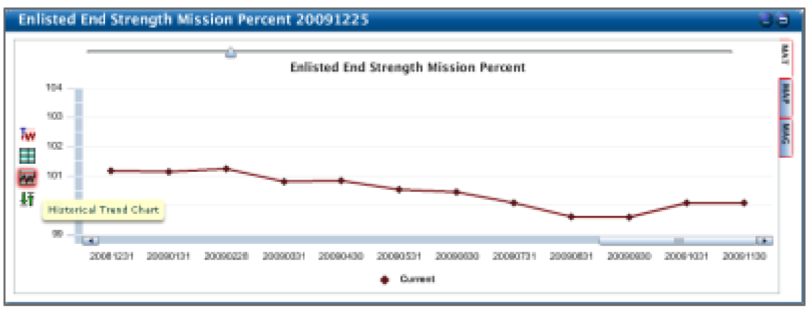

Enlisted End Strength Mission Percent 20091225

Month	Current FY	Previous FY
Oct	100.1%	100.1%
Nov	100.1%	100.5%
Dec	100.0%	101.2%
Jan	0.0%	101.2%
Feb	0.0%	101.2%
Mar	0.0%	100.8%
Apr	0.0%	100.8%
May	0.0%	100.5%
Jun	0.0%	100.5%
Jul	0.0%	100.1%

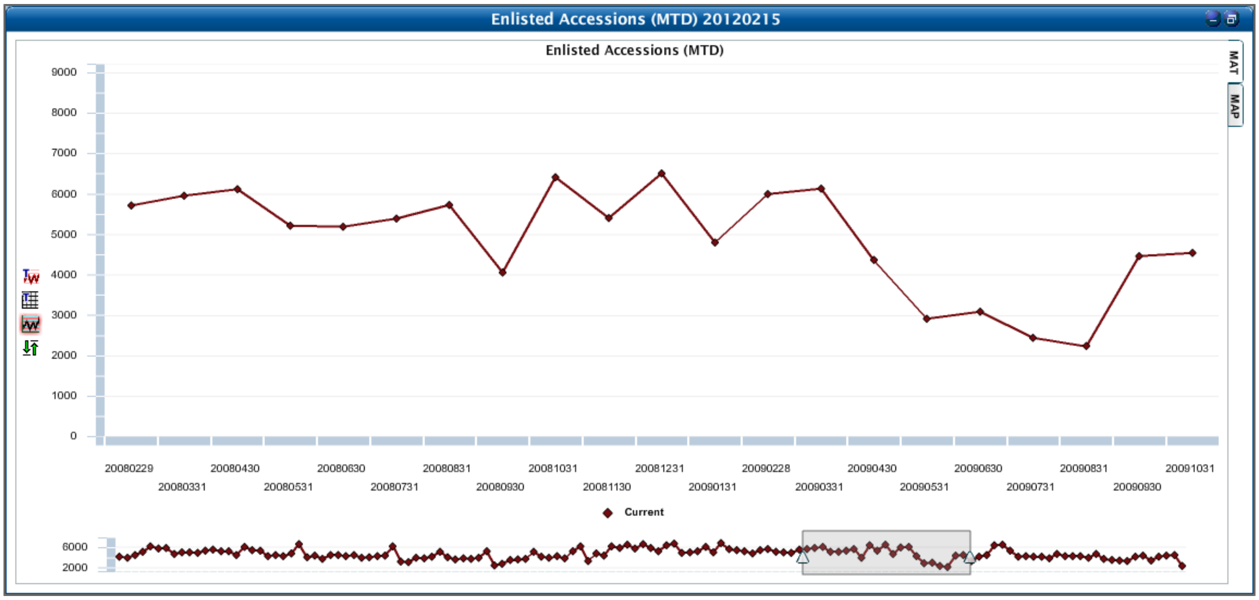
The Trend Data table contains the data used to build the Comparative Trend Chart. Specifically, the Comparative Trend Chart View shows graphs for the Current Fiscal Year and for the Previous Fiscal Year. The data supporting those graphs is here. Benchmark Data is the data behind the Benchmark Chart. These are the numbers used to build the graphs in the Benchmark Chart View. Drill-Down Report supports the Metric Against Goal view.

8.1.1.6 Historical Trend Chart

Historical Trend Chart is available in the MAT tab. This chart shows all Historical Trend data available.



Move the two triangles at the bottom of the screen to show a different range of data within the chart.



8.1.2 Metrics Panels

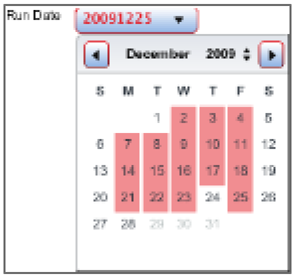
Dashboard metric panels are: Dashboards, Subscribe, Run Date Filter and Refresh Metrics (located on the left side of the screen), and Export to PowerPoint, Descriptions and Help (question mark) located on the right side.

Click the **Subscribe** tab to subscribe to this particular dashboard.

Click the **Descriptions** button to see a short description of the metrics currently displayed on the dash-boards.

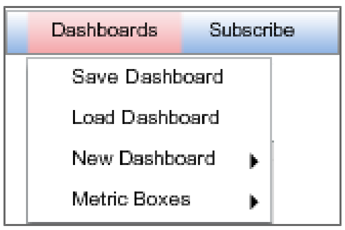
Dashboards displayed on the screen can be exported to PowerPoint to create a presentation. The **Export to PowerPoint** button serves this purpose.

The Run Date filter defaults to the latest available date. However, a user can specify a run date by clicking the black inverted triangle in the Run Date box and selecting a month and a date. Note that highlighted calendar dates are the only dates that can be selected.



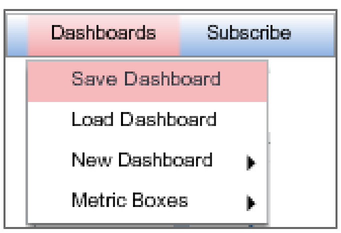
Select a date and click the **Refresh Metrics** button to view updated data on the dashboard.

Click the **Dashboards** tab to open the drop-down menu.

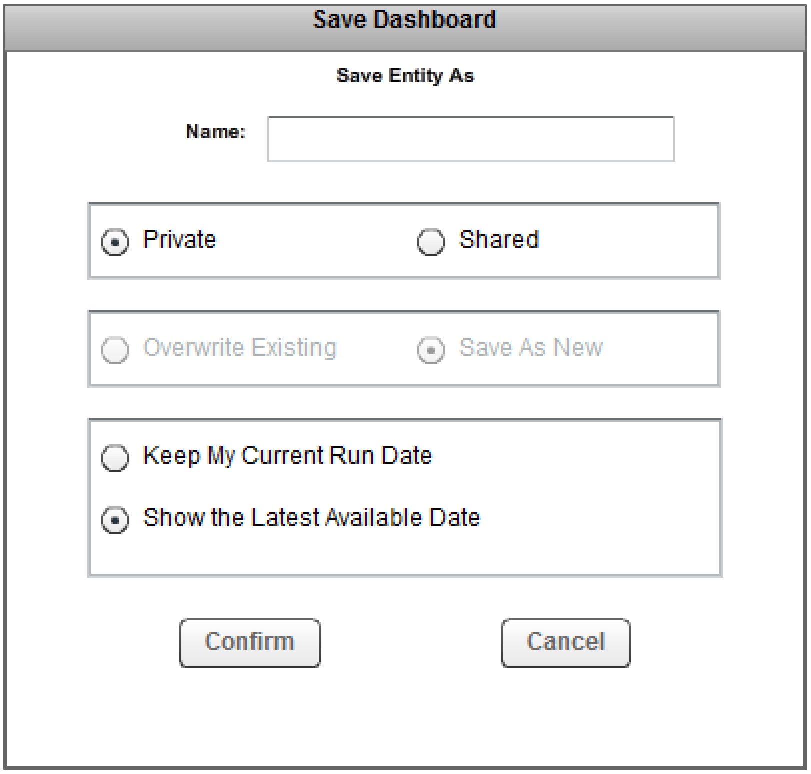


8.1.2.1 Save Dashboard

Save Dashboard allows the user to save the dashboard.



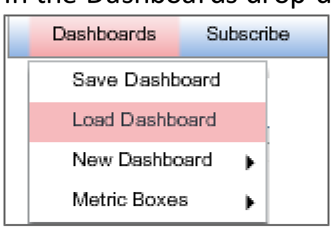
Click **Save Dashboard**. A pop-up window appears.



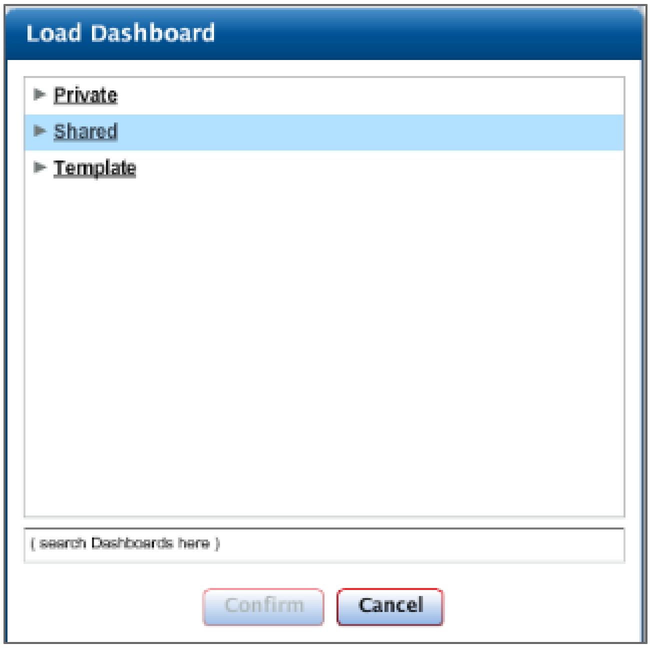
Enter a name for the dashboard, and click **Confirm** to save it.

8.1.2.2 Load Dashboard

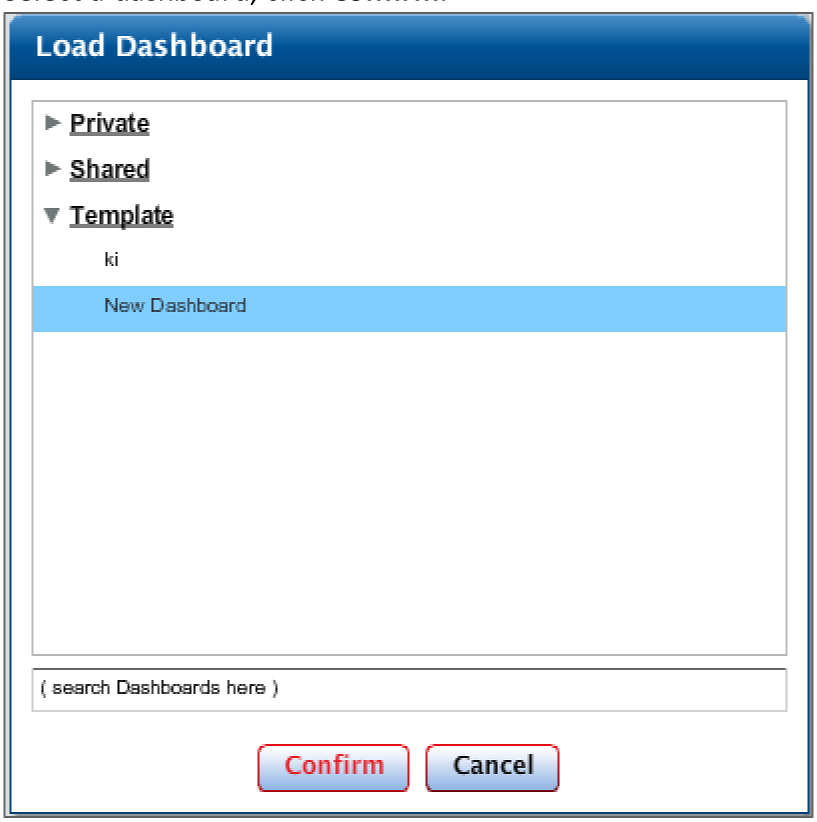
In the Dashboards drop-down list, **Load Dashboard**, will load any saved dashboard.



Click the **Load Dashboard** button. A pop-up window displays all available saved dashboards. Users can drill down, select, and load a dashboard of their choice.

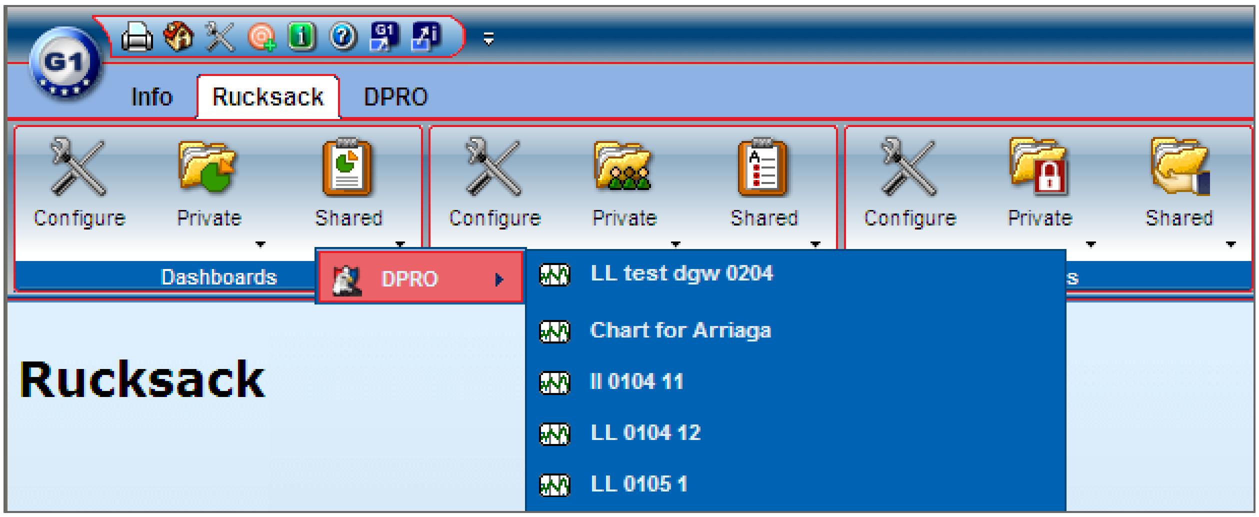


Select a dashboard; click **Confirm**.



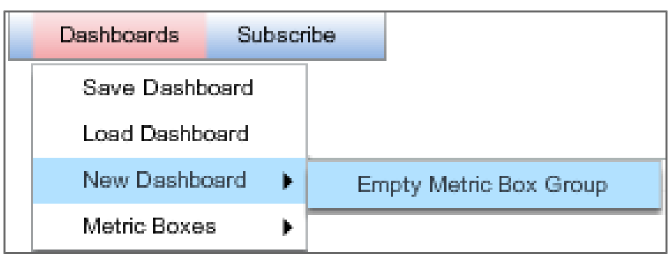
The saved dashboard loads on the screen.

Note: You can also load a saved dashboard from the Rucksack. Look again at the main menu which runs across the top of the screen. The item labeled **Rucksack** has a drop-down menu for accessing Dashboards and Reports. Note that a choice can be made between Private and Shared Dashboards; and between Private and Shared Reports. A saved dashboard can be retrieved from the menu.

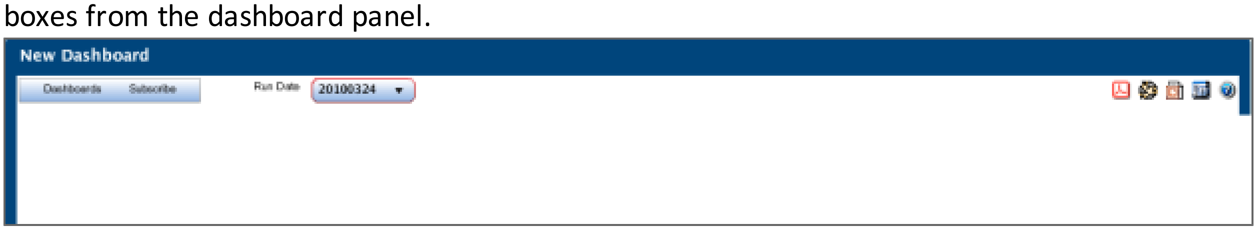


Once the link to the application is activated, a list of available dashboards will be shown; simply choose one to load.

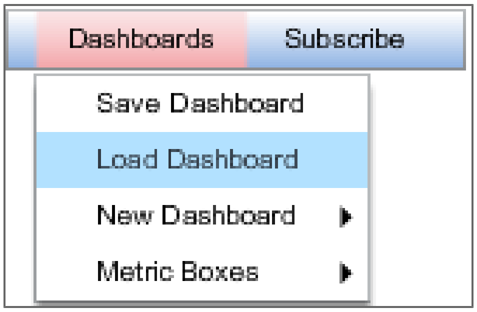
8.1.2.3 New Dashboard



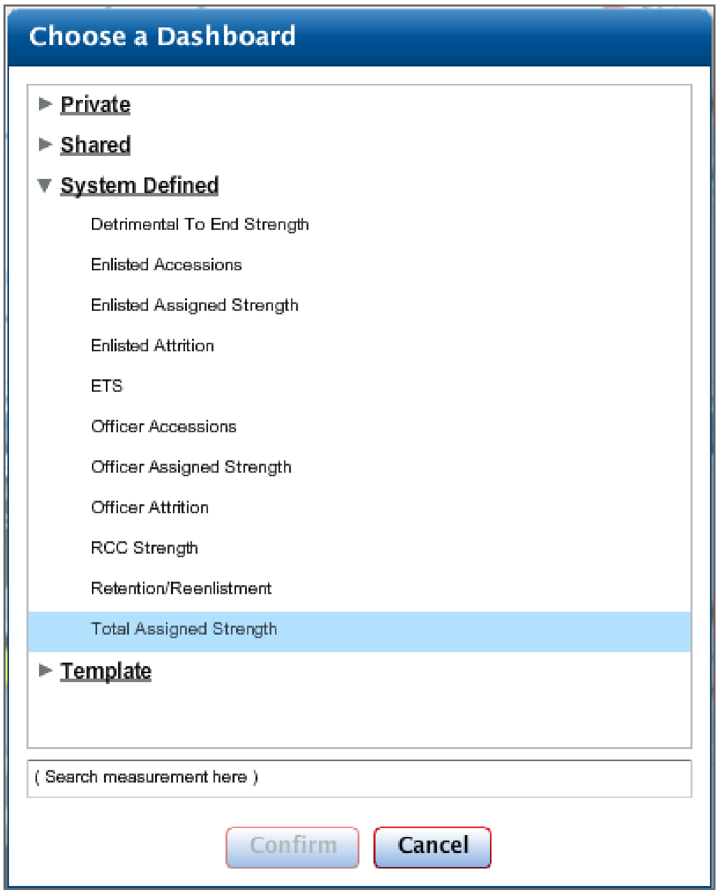
Note that **New Dashboard** has its own listed item. Click **Empty Metric Box Group** to clear the metric boxes from the dashboard panel.



To restore the dashboard of your choice, select **Load Dashboard** from the Dashboards panel's drop-down list.



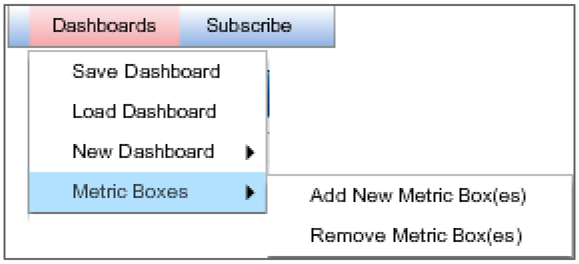
Select one of the available dashboards from the list and click **Confirm**.



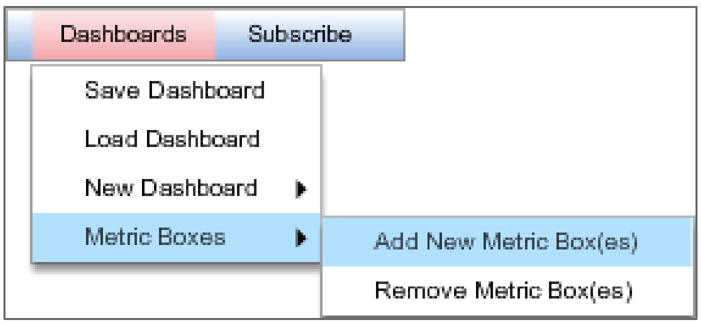
A dashboard can also be loaded via **Rucksack | Dashboards** on the Ribbon Toolbar, as discussed in the **Load Dashboard** section. Regardless of which method is used, the dashboard is restored.

8.1.2.4 Metric Boxes

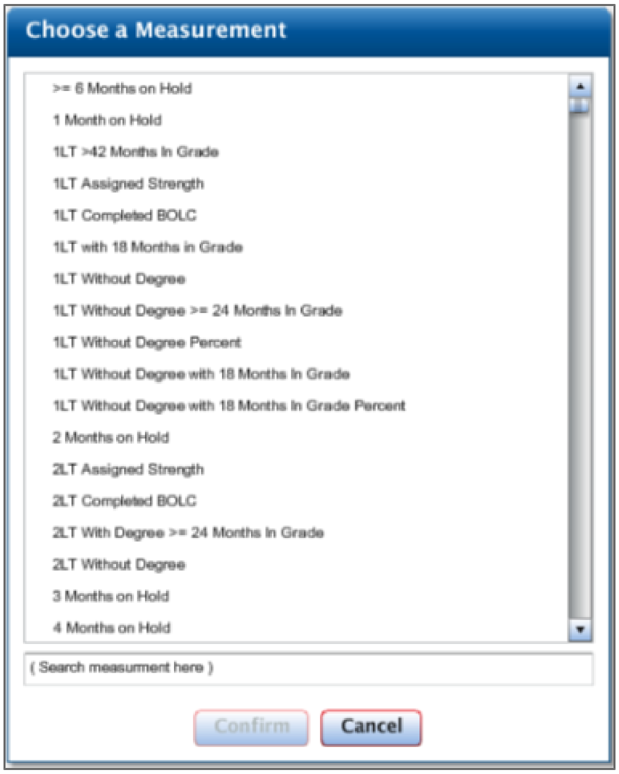
The last item within the **Dashboards** drop down menu, **Metric Boxes**, has two drop-down list items, **Add New Metric Box(es)** and **Remove Metric Box(es)**.



Click **Add New Metric Box(es)**.

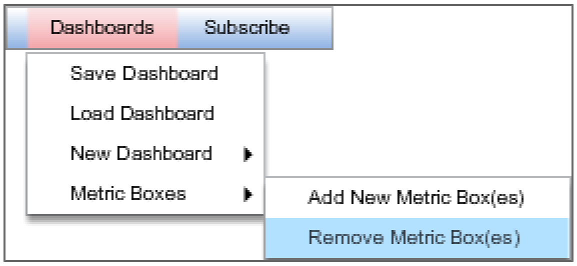


The **Choose a Measurement** pop-up window appears on your screen.

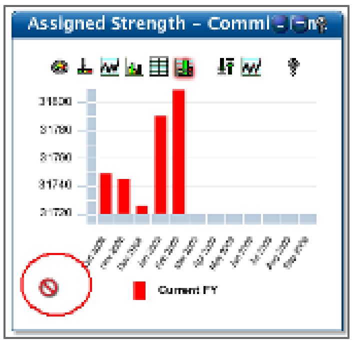


Scroll down to find the desired measurement, select it, and click **Confirm**. The metric boxes currently existing on your dashboard will be resized to accommodate the new addition.

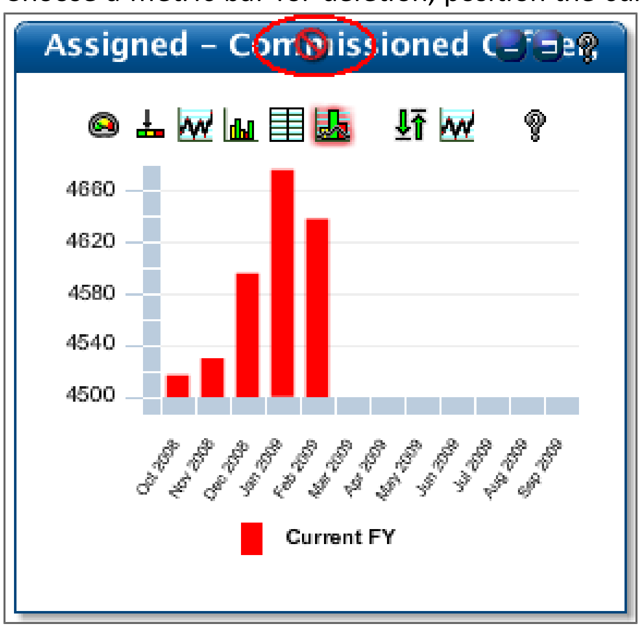
Now select the second element in the **Dashboards | Metric Boxes** drop-down list, **Remove Metric Box(es)**.



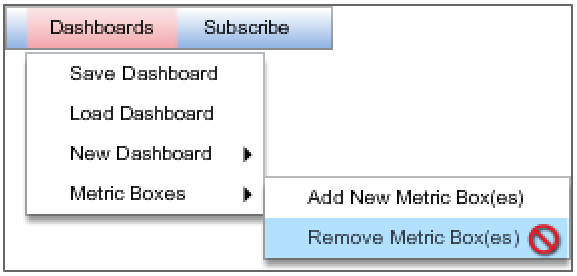
The cursor arrow turns into a delete cursor . Metric box deletion is now enabled.



Choose a metric bar for deletion; position the cursor inside the Title Bar of the box and click.



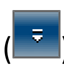
The metric box is immediately deleted. The remaining metric boxes automatically resize to fill the dashboard panel. It is possible to delete as many metric boxes as are visible on the dashboard. When all deletions are complete, return to **Dashboards | Metric Boxes | Remove Metric Boxes**.



Click the highlighted tab to return the cursor to the arrow; this disables metric box deletion. A second way to restore the arrow is to press the Escape key.

8.1.3 Basic Dashboard

The Basic Dashboard functionality allows you to create your own dashboards—a visual collection of measurements that is automatically updated on a regular basis and is either predefined or customized by the user—quickly and easily. The Advanced Dashboard is still available for experienced users, but Basic Dashboard allows you to focus on adding metric boxes only. You no longer need to concern yourself with different styles, colors, and graphics.

Tip: When using Basic Dashboard, it is recommended that you click the Collapse Ribbon icon () in order to more easily view the dashboard layout on the screen.

Explore any of the following topics to learn more:

8.1.3.1 Accessing Basic Dashboard 75
8.1.3.2 Adding Metric Boxes 75
8.1.3.3 Removing Metric Boxes 75
8.1.3.4 Replacing One Metric Box with Another 76
8.1.3.5 Saving Dashboards 76
8.1.3.6 Loading Dashboards 77
8.1.3.7 Subscribing to a Dashboard and Exporting a Dashboard to PowerPoint 77

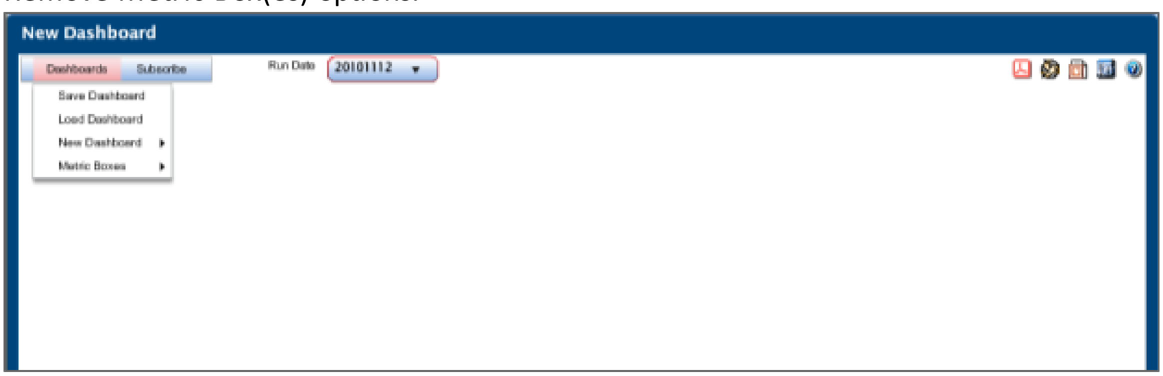
8.1.3.1 Accessing Basic Dashboard

1. Log into the G1 Portal.
2. Click the **DPRO** tab.

3. Click **Basic Dashboard**.
   The Basic Dashboard screen appears, along with a pop-up window displaying available measurements.
4. Select a Measurement, and click **Confirm.**The selected metric box appears on the screen.

8.1.3.2 Adding Metric Boxes

1. Click the **Dashboards** button.
   A drop-down menu opens, displaying the Save Dashboard, Load Dashboard, and Add or Remove Metric Box(es) options.



2. Click **Metric Boxes | Add Metric Box(es)**.
   A pop-up window appears containing a list of available metrics.
3. Choose a metric from the list and click **Confirm**.
   A metric box appears on the screen.
   Note: Metric Boxes automatically resize as you continue to add more of them.
4. To rearrange the Metric Boxes that have been added, click the title of the Metric Box and drag it to a different position.

8.1.3.3 Removing Metric Boxes

1. Click **Metric Boxes | Remove Metric Box(es)**.
   The arrow cursor now appears as a delete cursor ().
2. Click the title of the Metric Box.
   The Metric Box is removed.

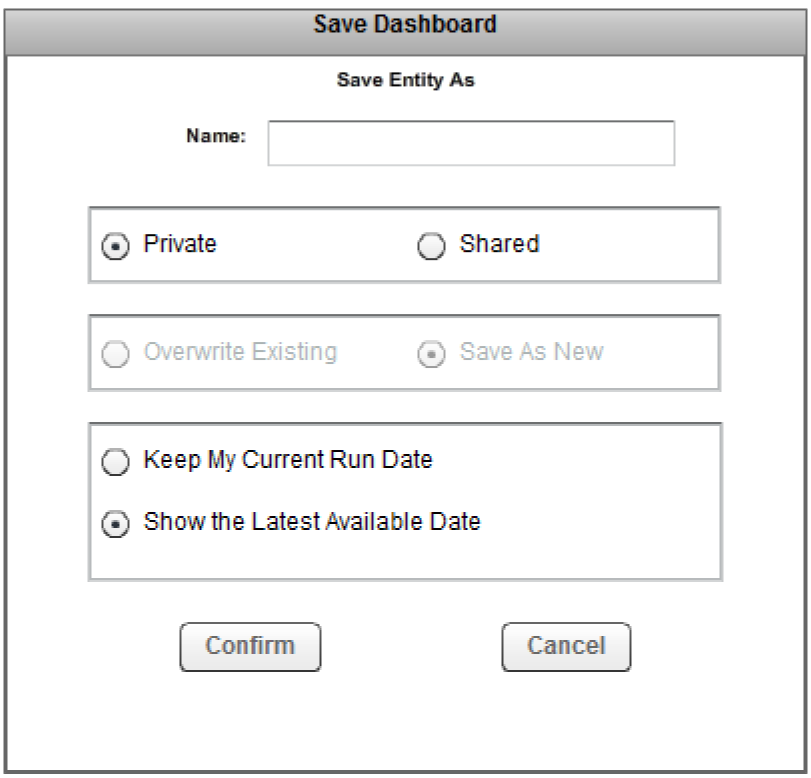
3. Click **Metric Boxes | Remove Metric Box(es)** again.
   The delete cursor again becomes an arrow cursor.

8.1.3.4 Replacing One Metric Box With Another

1. Right-click the title bar of the metric that is currently visible.
   A menu will open with a few different options available.
2. Click **Select a Different Metric Box**.
   This opens the "Choose a Measurement" box that appears upon first opening Basic Dashboard.
3. Select a new measurement and the new metric box will replace the currently visible one.

8.1.3.5 Saving Dashboards

1. Click **Save Dashboard**.
   A screen appears with options to save the dashboard as Shared (viewable by anyone) or Private (viewable only by you), and to Keep the Current Run Date or Show the Latest Available Date.



2. Click **Confirm**.
   Your dashboard is now saved, and can be accessed in the Shared or Private Dashboards section of the Rucksack.

8.1.3.6 Loading Dashboards

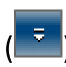
1. Click **Load Dashboard**.
   A screen appears with a list of previously saved Shared and Private dashboards.
2. Select the dashboard you want to load and click **Confirm**.
   The dashboard is now loaded on the screen.

8.1.3.7 Subscribing To A Dashboard And Exporting A Dashboard To PowerPoint

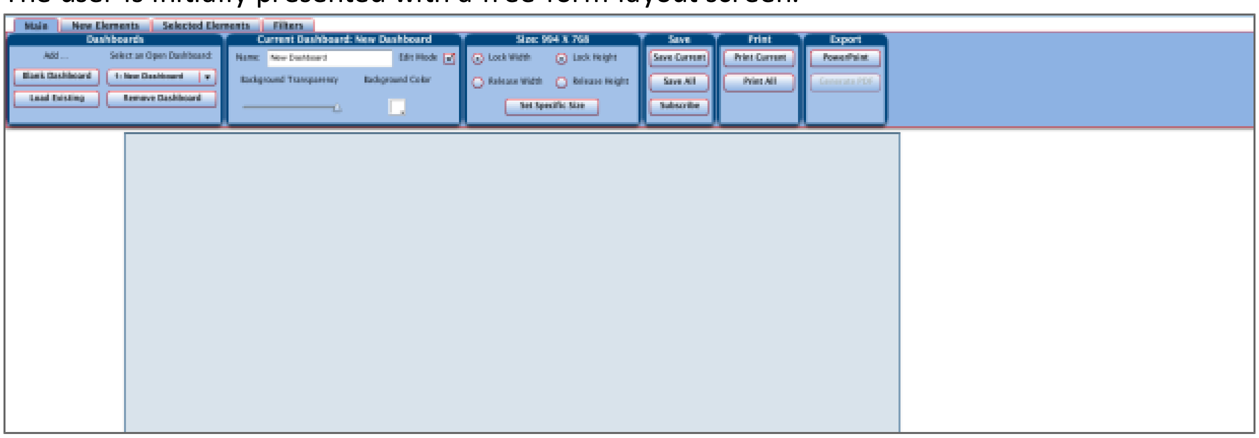
1. Click **Subscribe.** You have now subscribed to the current dashboard.
2. Click **Export to PowerPoint**.
   The dashboard is exported to a PowerPoint spreadsheet.

8.1.4 Advanced Dashboard

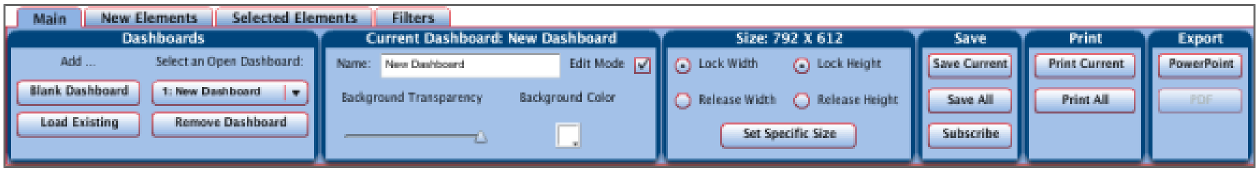
The Advanced Dashboard functionality is accessible via **DPRO** and offers the opportunity to generate your own gauge, chart, or grid. Each section will be described in the following sections.

Tip: When using Advanced Dashboard, it is recommended that you click the Collapse Ribbon icon () in order to more easily view the dashboard layout on the screen.

The user is initially presented with a free-form layout screen.



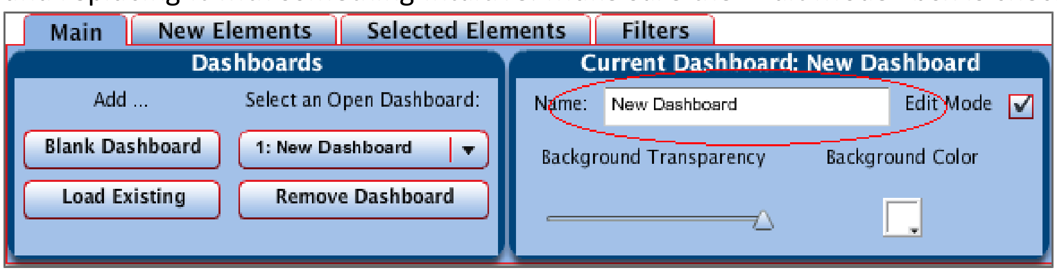
The layout area is where the user will select elements to create a Dashboard that will be the most useful to the daily work and mission. Note that there are four tabs at the top of the screen: Main, New Elements, Selected Elements, and Filters, discussed in detail in the following sections.



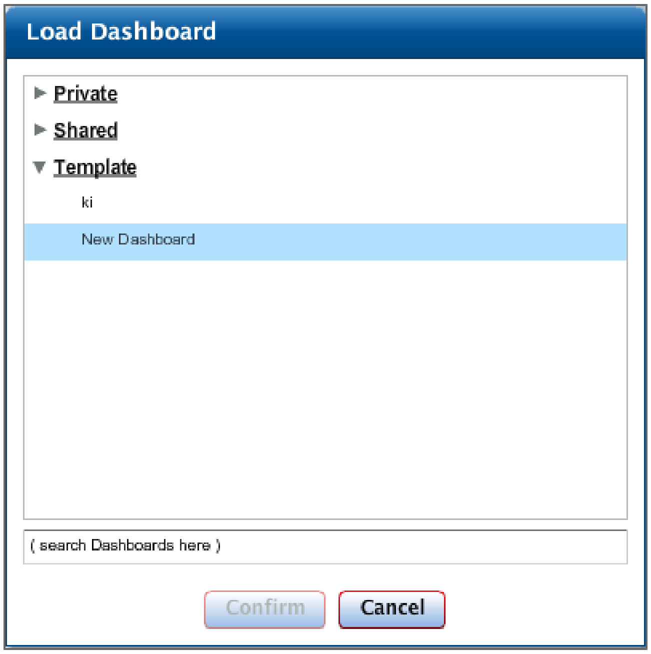
8.1.4.1 Main Tab

The Main tab allows users to start building a dashboard by adding a blank dashboard or loading an existing one.

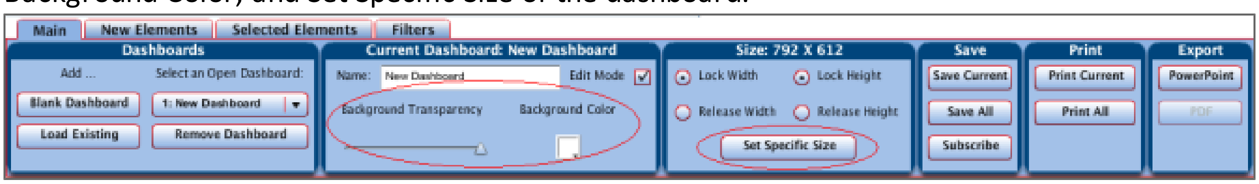
To add a blank dashboard, click the **Blank Dashboard** button. You can give your new dashboard a name in the Current Dashboard field by selecting the default text (New Dashboard), or by deleting it, and replacing it with something intuitive. Make sure the "Edit Mode" box is checked.



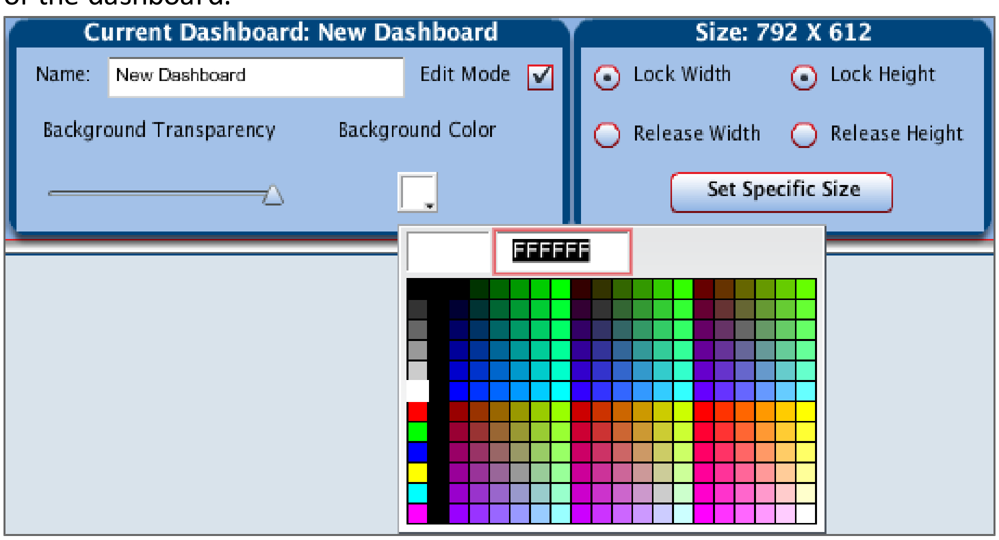
To load an existing dashboard, click the **Load Existing** button. You will be presented with a pop-up menu allowing you to select from the list of available dashboards. Click the name of the dashboard you want to load (it will be highlighted in red at this point) and click the **Confirm** button. The dashboard will load on the screen.



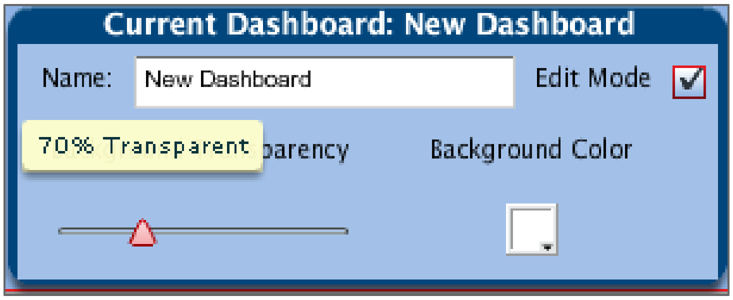
Once the dashboard is loaded, a user can customize the view by selecting Background Transparency, Background Color, and Set Specific Size of the dashboard.



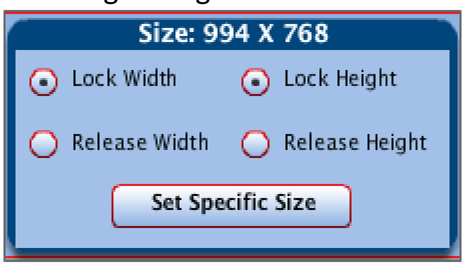
Clicking the Background Color box will bring up a menu of colors that can be chosen as a background of the dashboard.



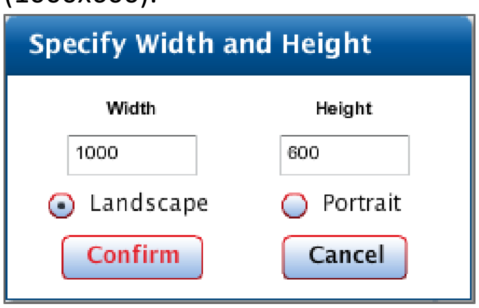
Moving the triangle on the Background Transparency line will change the transparency of the staging area.



Users can customize the size of an image on the dashboard by locking/releasing width and/or height of the image using radio buttons.



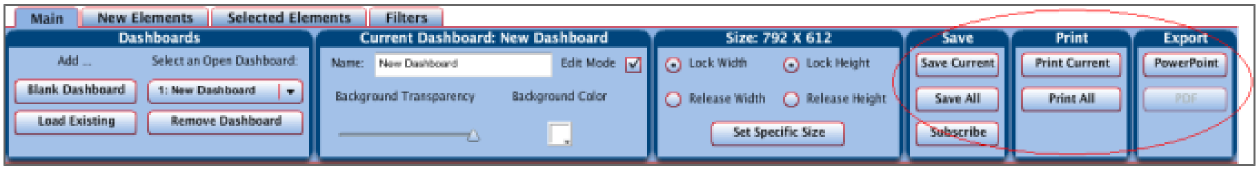
Another option is to click the **Set Specific Size** button. (Notice that the current size is 994x768). Clicking the **Set Specific Size** button opens a pop-up window. From here, you will be unable to change the width or height of the dashboard until you select either the **Landscape** or **Portrait** radio button. After selecting either radio button, you will be able to type in the desired width and height of the dashboard (1000x600).



The layout area will resize to match the width and height requested for better customization, while still keeping the Landscape or Portrait configuration that you first chose.

Note: Clicking the **Portrait** and **Landscape** radio buttons dictate the orientation of the page when it is printed and will change the size of the dashboard, regardless of anything that you input into the Width and Height boxes. Selecting **Portrait** resizes the dashboard to 768 x 994, whereas selecting **Landscape** resizes the dashboard to 994 x 768.

Once you have customized an image on your dashboard you can **Save**, **Print**, **Subscribe** to, or **Export** the dashboard by clicking one of the corresponding buttons.

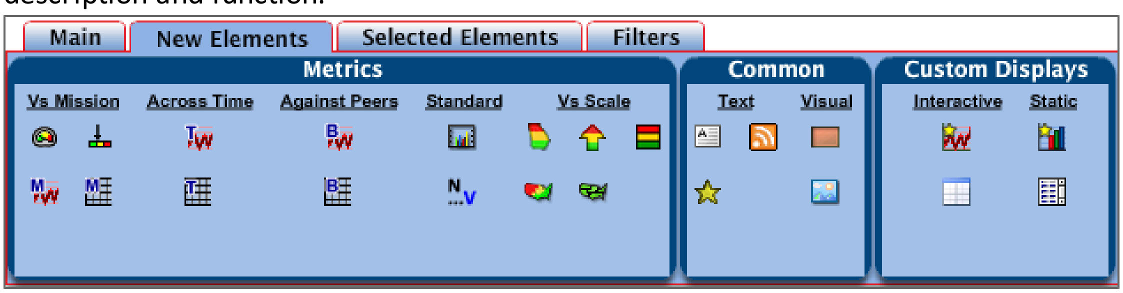


Clicking the **Save Current** (or **Save All**) button will bring up a pop-up window allowing you to save the dashboard as private, public, system defined, or template. It will also provide an option to overwrite the existing dashboard, or save the current dashboard as new.

Click **Confirm** to save your selections.

8.1.4.2 New Elements Tab

The **New Elements** tab provides a menu of metrics, common elements and custom displays that users can select when creating a new dashboard. Hover your mouse over a picture of an element to see its description and function.



The following Metrics Elements are available:

- **Metric Box:** An interactive component displaying many associated element types for a given metric.

- **Monthly Evaluative Arrow:** An image of an arrow colored based on the ranges scale of the metric, and pointing in the direction of the metric's change.
- **Evaluative Map:** A colored image of a state, colored based on the scale of the metric.
- **Evaluative Box:** A full block colored based on the ranges scale of the metric with value displayed at its center.
- **Name and Value:** Bold text of the metric's name and value.
- **USA Map:** An evaluative USA map colored green, amber, or red based on the scales provided.
- **USA Regional Breakdown Map:** An evaluative USA regional breakdown map.
- **Gauge:** A colored speedometer type gauge for displaying a metric value on its ranged scale.
- **Mission Chart:** Bar and Line chart plotting Actual vs. Mission data.
- **Horizontal Slide Scale:** A colored horizontal bar for displaying a metric value on its ranged scale.
- **Mission Data:** A row/column data grid for displaying all the mission data for a given metric.
- **Comparative Trend Chart:** A line graph displaying historical trend data for a given metric.
- **Comparative Trend Data:** A row/column data grid for displaying all the trend data for a given metric.
- **Benchmark Chart:** A vertical line graph displaying the benchmark data of a given metric.
- **Benchmark Data:** A row/column data grid for displaying all the benchmark data for a given metric.

The following Common Elements are available:

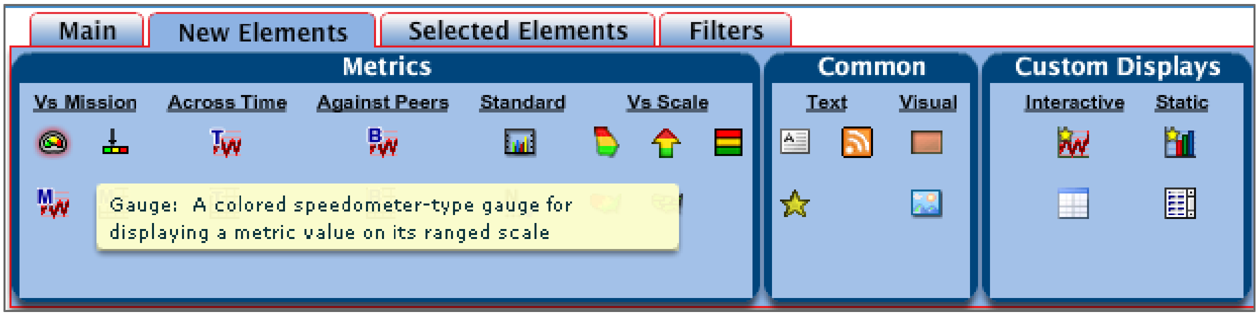
- **Text Area:** An area for displaying strongly formatted text.
- **Text Star:** A drawn star component with a text box inside.
- **RSS ticker:** A scrolling RSS feed ticker.
- **Empty block:** A customizable empty box for creating borders, sectioned background colors, overlays, etc.
- **Image:** An image loaded from a provided URL.

The following Custom Displays Elements are available:

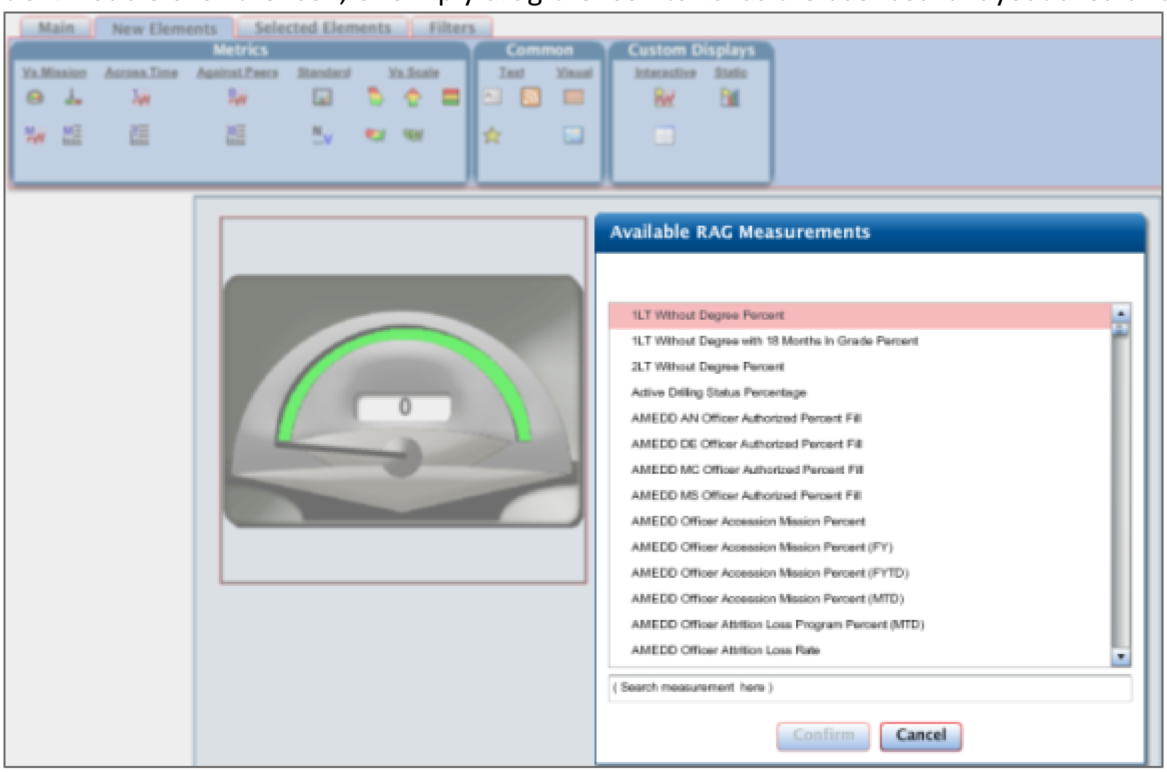
- **Table:** A table with user-defined rows and columns.
- **Custom Chart:** a fully customizable chart component.
- **Chart Wizard:** An interactive question-based wizard for generating charts.
- **Data Grid Wizard:** An interactive question-based wizard used for generating a row/column data grid.

8.1.4.2.1 Metrics Elements

Now we will look at placing a Metrics Element on the Dashboard Layout, using a Colored Gauge as an example. All of the Metrics Elements are handled in the same way. Therefore, this section can be referenced for handling any Metrics Element that you may wish to place in your new Dashboard Layout.



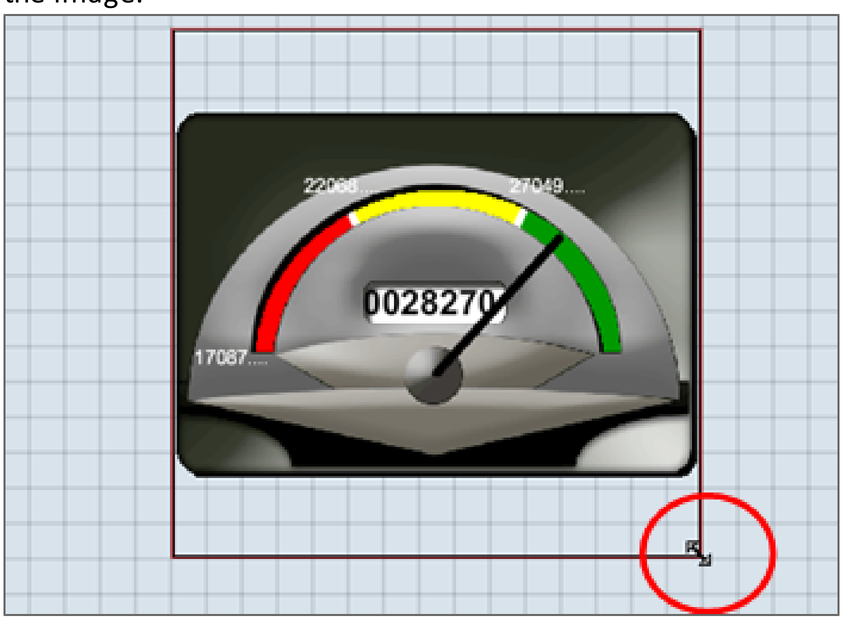
To place a Gauge on your new Dashboard, place your cursor over the **Gauge** icon in the Metrics section. Double click the icon, or simply drag the icon towards the dashboard layout area and release.



Select measurement data from the pop-up list to be displayed on the Gauge and click Confirm. The data is now shown on the Gauge.

Notice that as you hover over the numerical values shown on the Gauge, you will see a small pop-up window describing what the numerical value represents.

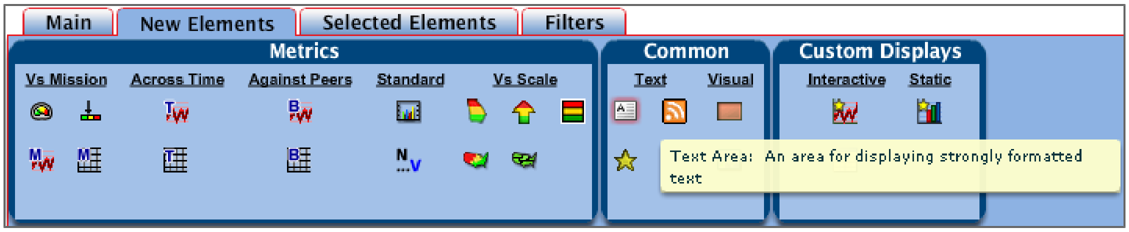
To move the Gauge within the layout, simply click the Gauge and drag it to the desired position. To change the size of the image on the screen, move your mouse towards one of the corners of the image. You will see a little two-sided pointed arrow. Moving the arrow allows you to modify the size of the image.



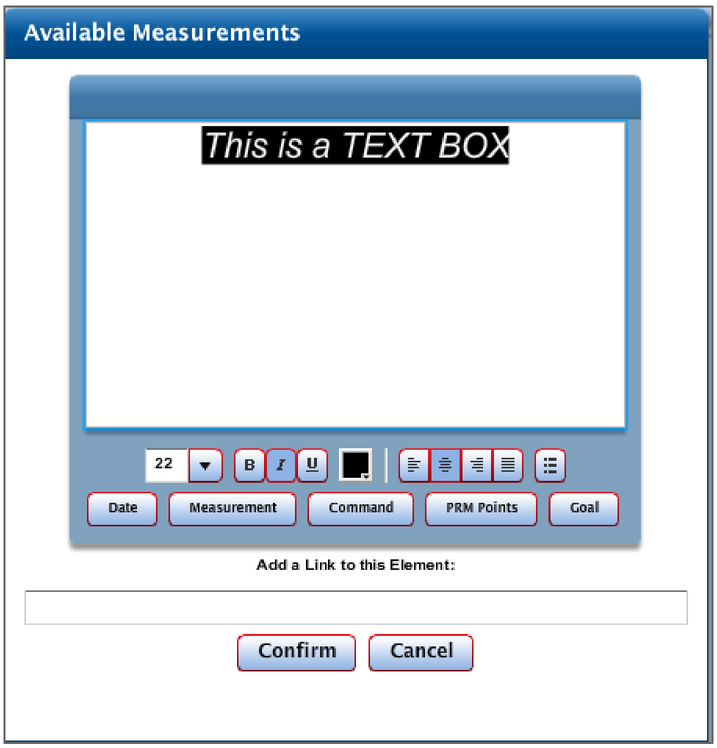
8.1.4.2.2 Common Elements

8.1.4.2.2.1 Text Area

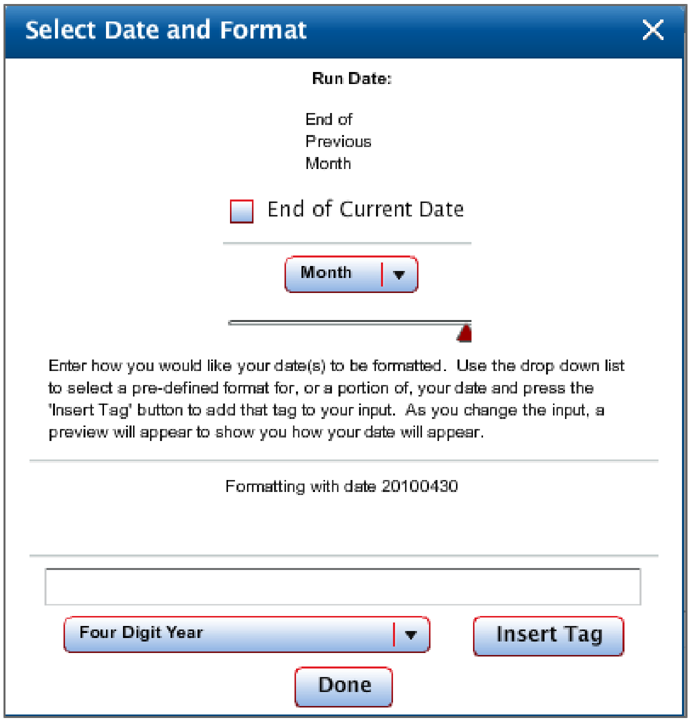
The Text Area element allows users to input and format text, as well as dates and some calculated values.



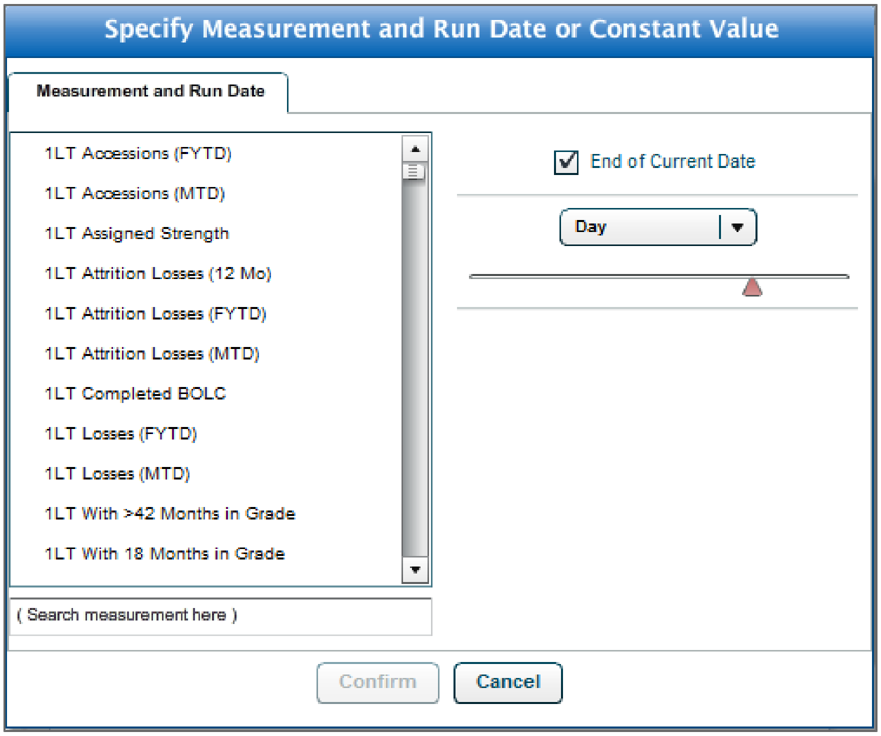
Drag and drop the Text Area icon onto the dashboard; enter some text into the empty field of a pop-up screen and highlight it.



Now you can format the text as desired: you can change color, size, justification, and add numbers or bullet points. Click the Date button to add and format a date; a pop-up window deploys for use in formatting the date. From here, you can select the “End of Current Date” checkbox to show data for the current day, or select any other day, month, or year (up to five previous fiscal years). You are then able to select a format in which the date will appear on the screen. Click the **Insert Tag** button, and then click **Done**.

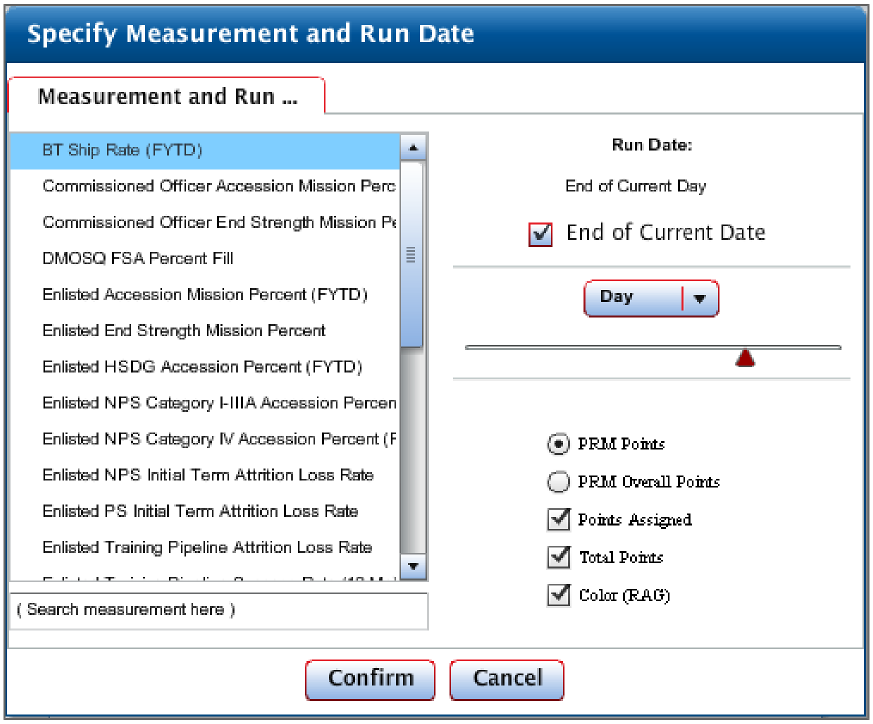


Click **Measurement**; select a measurement, and choose to have the measurement reflect either the current day's value by selecting the "End of Current Date" checkbox, or any other day, month, or year (up to five previous fiscal years). Click **Confirm**.

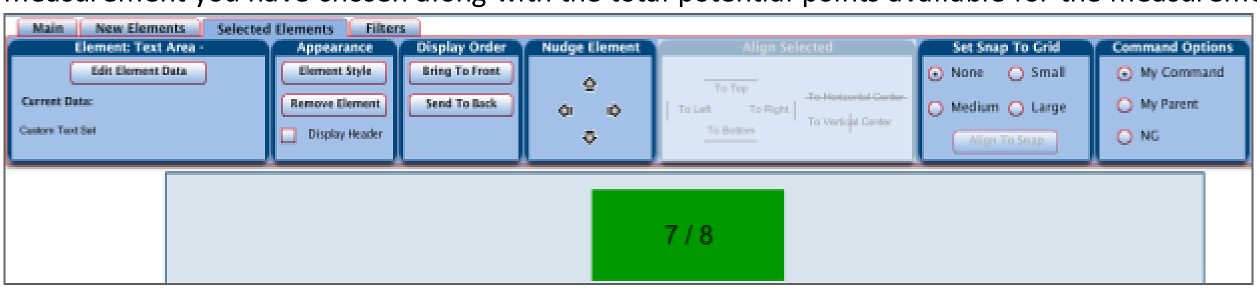


Click Command to select to show either the Command Level, such as NGB, or the Command Value, such as NG.

Click PRM Points to open a window displaying a list of all evaluative metrics in the application.

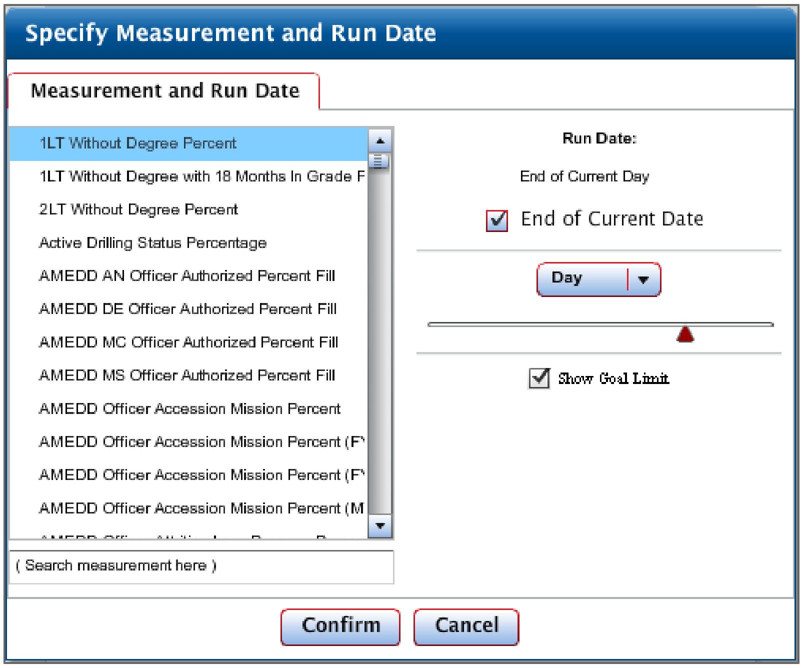


Either select one of these metrics or select the “PRM Overall Points” radio button, and then click Confirm. The Text Box will then appear on the screen with the number of points currently assigned to the measurement you have chosen along with the total potential points available for the measurement.



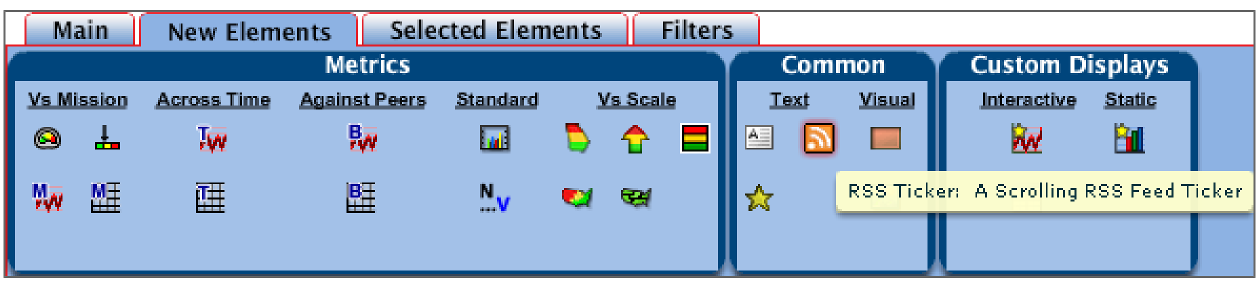
The Text Box will also be either Red, Amber, or Green, representing how well your selected command level is achieving its goal for that specific measurement.

Finally, click Goal to open a window allowing you to choose to show the current goal for all applicable metrics. Once you have selected a measurement, click Confirm.

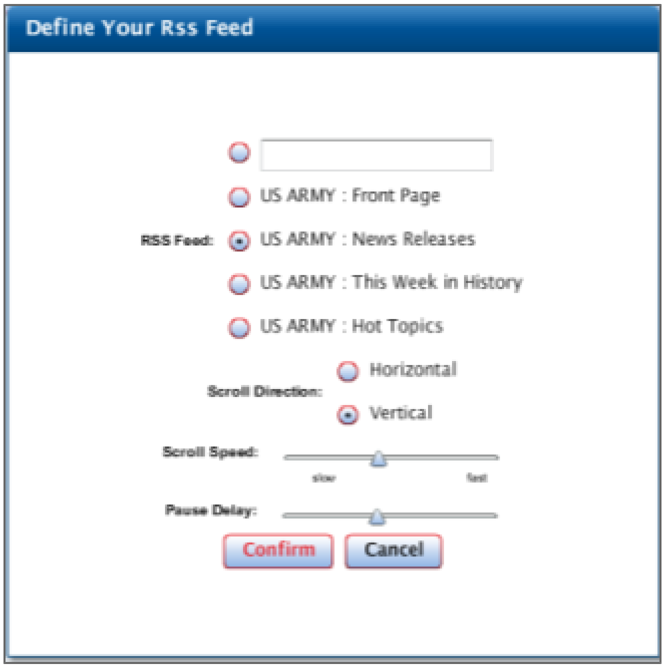


8.1.4.2.2.2 RSS Ticker

The RSS ticker element allows users to subscribe to RSS Feeds.

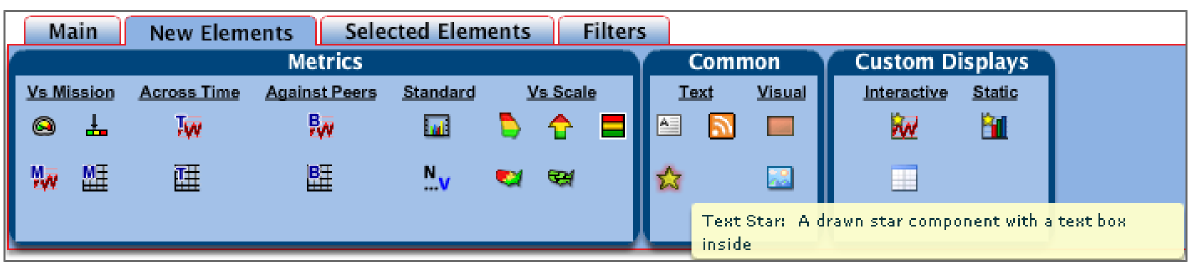


Select the **RSS Ticker** icon from the New Elements menu, double click it (or drag it onto a dashboard), and position it as desired. The following pop-up screen will allow you to define your RSS Feed. Select the source of RSS Feed and Scroll Directions by clicking the appropriate radio buttons. Use the small sliding triangle to select Scroll Speed and Pause Delay. Click **Confirm**.

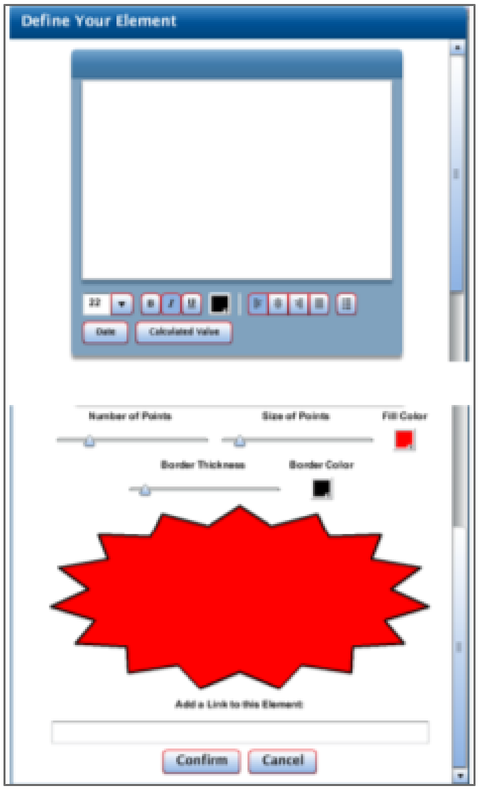


8.1.4.2.2.3 Text Star

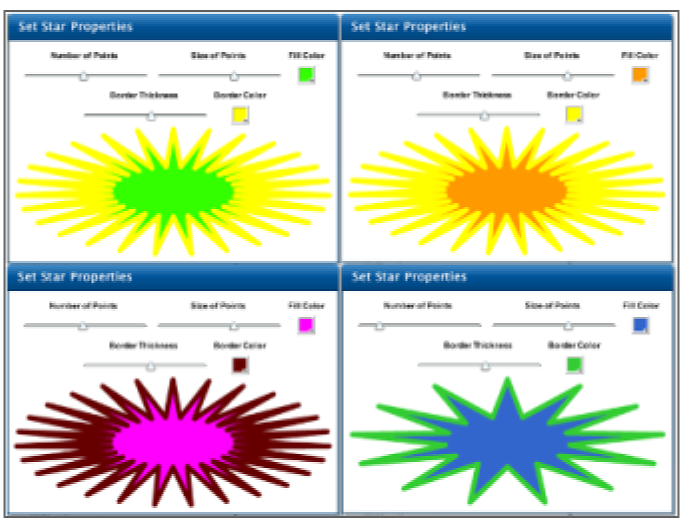
The Text Star element allows users to input and format text, as well as dates and some calculated values.



Select the **Text Star** icon from the New Elements menu and position it on the dashboard as desired. The Define Your Element pop-up menu will allow you to input and format text, enter dates and calculate values. (For more details on how to format and edit text, see Text Area on page 85 of this manual.)



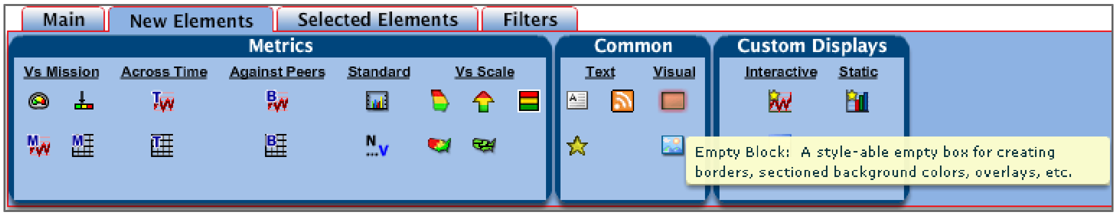
Further, you can configure the image of the Text Star: change the border type, the number of points displayed, the size of points, and the color of the star and its border. Numerous combinations are possible.



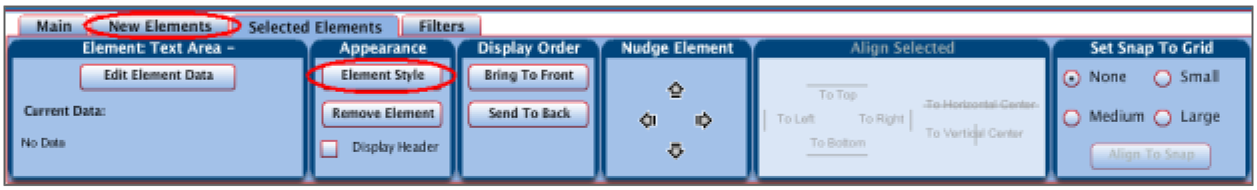
Click **Confirm** to save and view your selections.

8.1.4.2.2.4 Empty Block

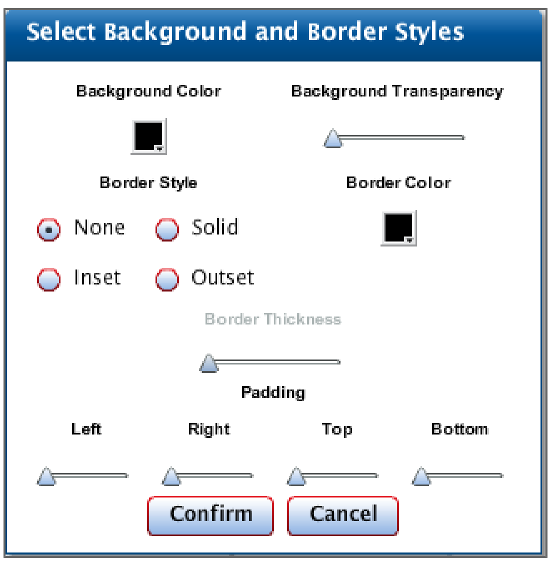
The Empty Block element can be used to create borders, background color, overlays, etc.



Drag and drop the Empty Block onto the dashboard. Click the **Selected Elements Tab**, and then the **Specify Element Style** button.

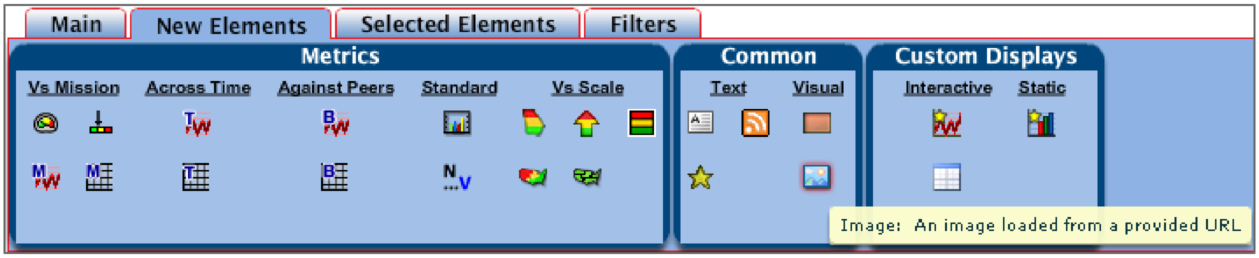


The following pop-up menu will appear, allowing you to select the Background and Border style and colors.

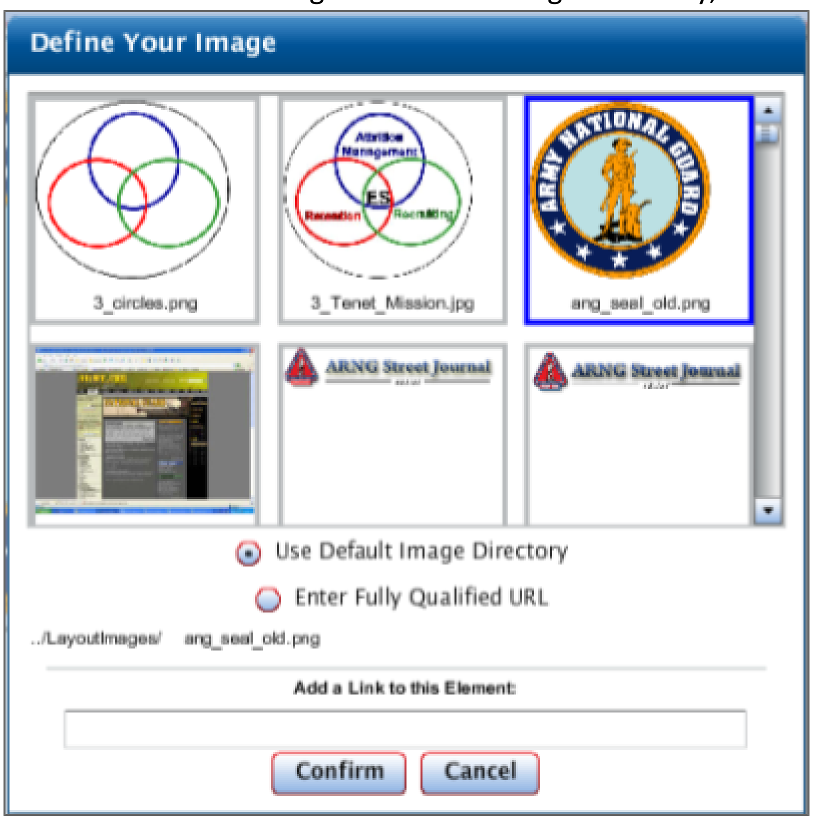


8.1.4.2.2.5 Image

The Image element allows users to insert an image loaded from a provided URL.



Select the **Image** icon from the New Elements menu, double click it (or drag it onto the dashboard), and position it as desired. The Define Your Image pop-up menu will allow you to select an image from the list of available images in Default Image Directory, or load an image from a specified URL.

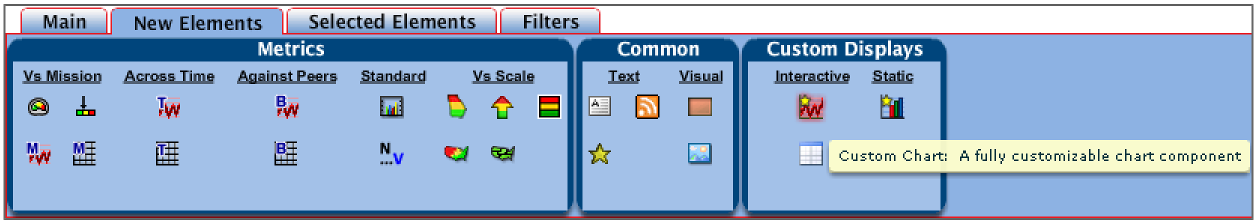


Click Confirm to see the image added to the dashboard layout.

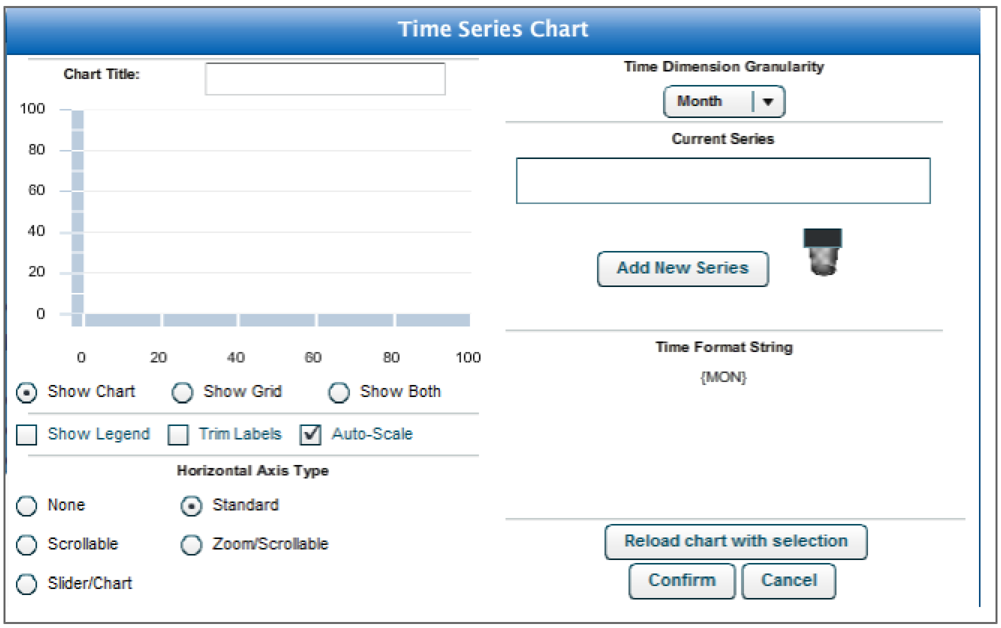
8.1.4.2.3 Custom Displays

8.1.4.2.3.1 Custom Chart

Locate and drag the **Custom Chart** icon onto the dashboard layout and position it as desired.

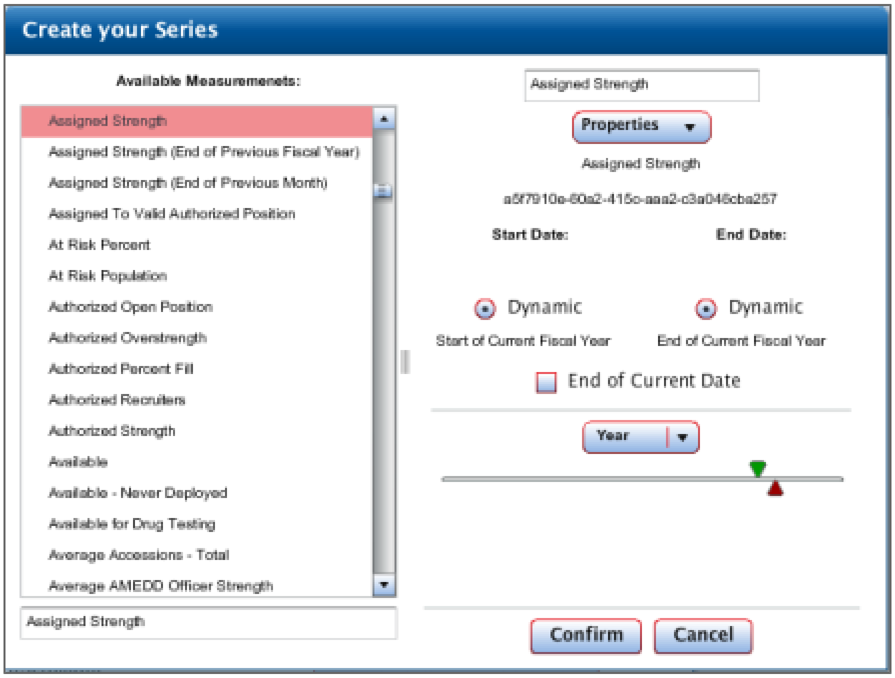


The resulting pop-up window will allow you to customize your chart. You can name the chart, select the Horizontal Axis Type, and choose to Auto-Scale the chart and Trim labels, among many other choices.

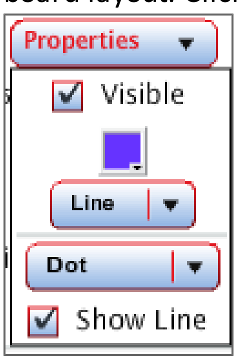


8.1.4.2.3.2 Time Series Chart

Click the **Add New Series** button, select a measurement to display from the list of Available Measurements, and name your New Series.



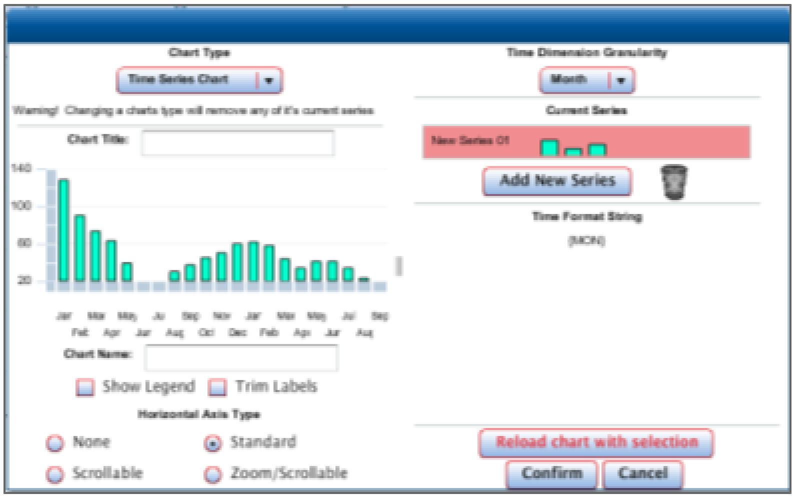
Properties of the chart can be selected to be displayed as a bar, a line, or an area. The type of line can be further customized. Users can select a color of the line, bar, or area, and its visibility of the dash-board layout. Click the **Properties** button to view a full list of the customization options.



Users can then select the Start Date and End Date of the chart to be Static or Dynamic. They can also check the “End of Current Date” box to ensure that the data in the chart is updated regularly.

After all necessary selections are complete, click the **Done** button.

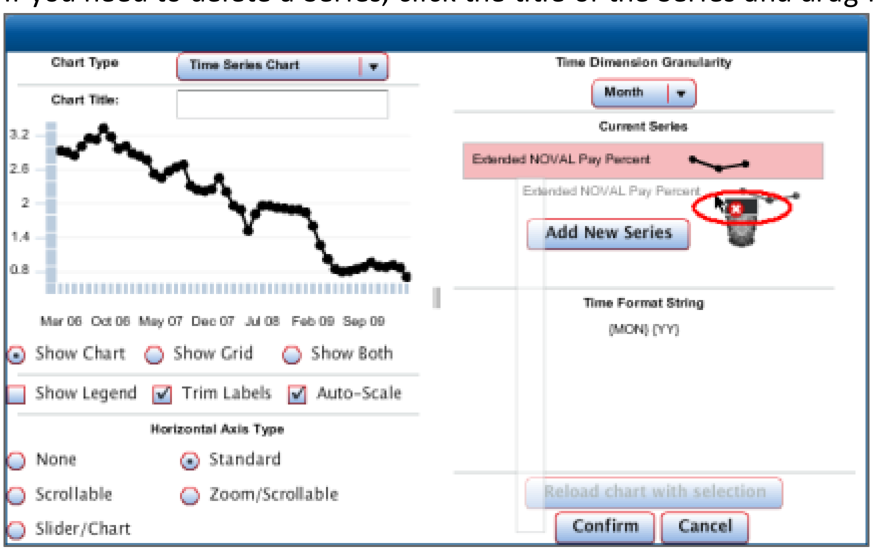
You will be brought back to the customize time series screen. Click the **Reload Chart with Selection** button - you will see the newly created time series chart displayed on the screen.



In this screen, you can change the Time Dimension Granularity to be Day, Month, Quarter, or Year. Your selection will be represented on the Horizontal Axis of the chart.

You can add more new series by clicking the **Add New Series** button.

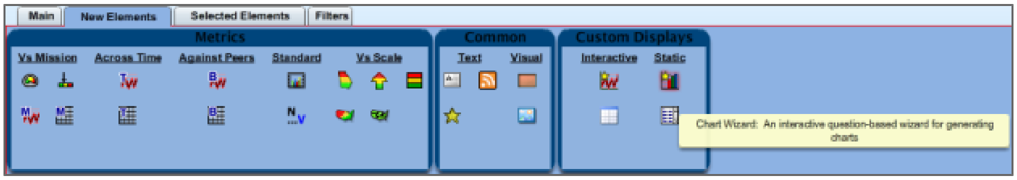
If you need to delete a Series, click the title of the Series and drag it toward the recycle bin.



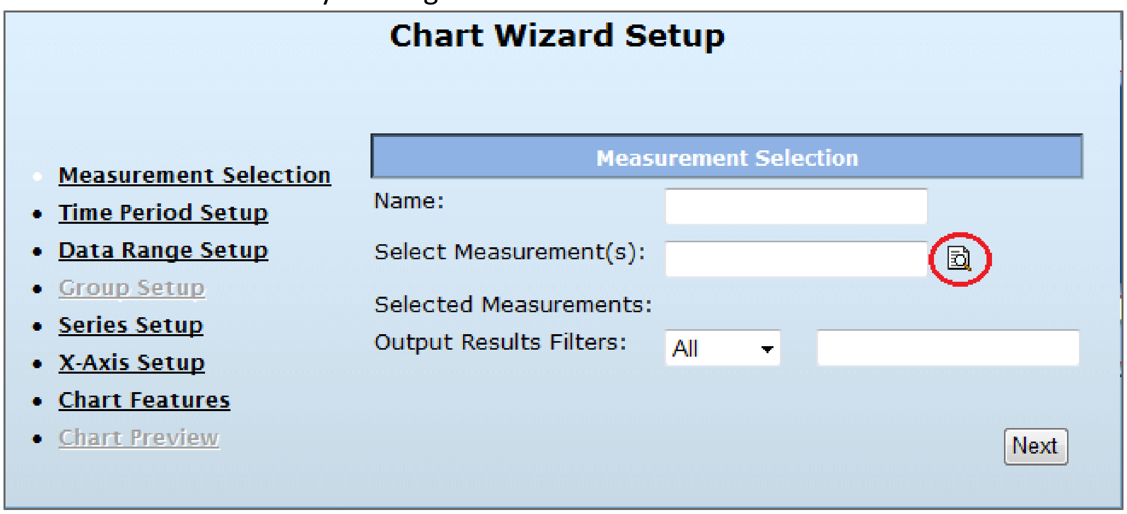
After you have finalized your selections, click **Confirm** to load the chart on the dashboard.

8.1.4.2.4 Chart Wizard

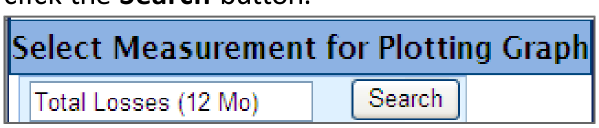
1. Drag the **Chart Wizard** icon onto the dashboard layout and position as desired.



2. The Wizard will guide you through the Measurement Selection, Time Period, Data Range, Group, Series, and X-Axis Setup.
3. Select a measurement by clicking the **Search** icon.

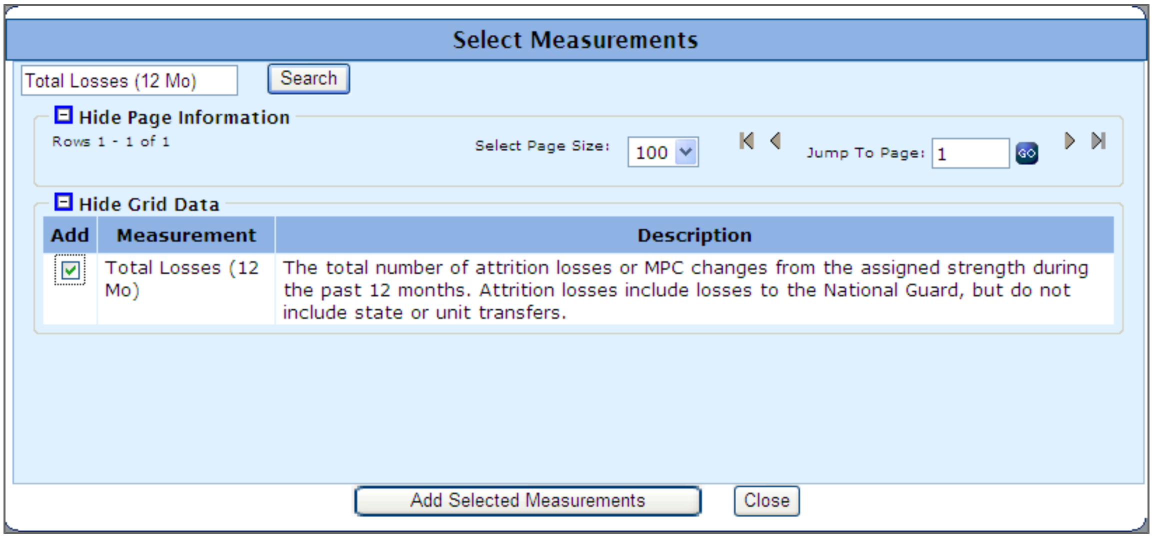


4. Type in the measurement you are searching for (Total Losses (12 Mo) in our example), and click the **Search** button.

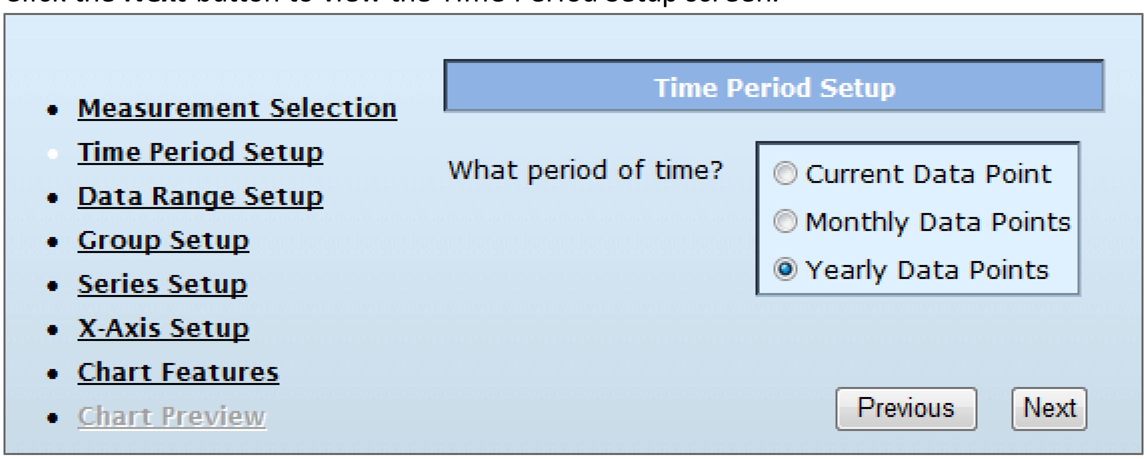


The search engine will bring up a list of Measurements that have Total Losses (12 Mo) in the Measurement description.

5. Click one of the Measurements to select it.

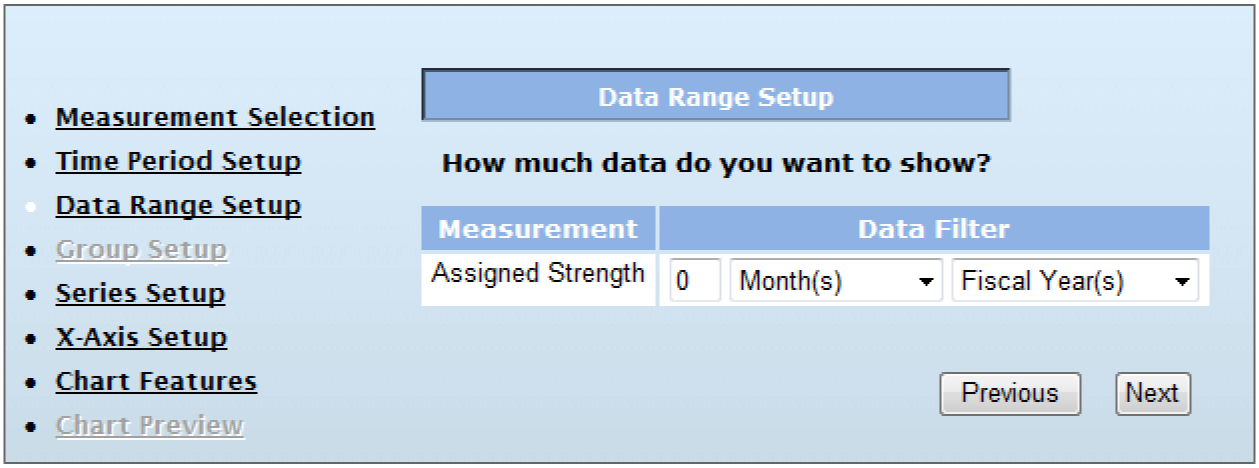


6. Click the **Add Selected Measurements** button.
   Your selected measurement is now listed on the Chart Wizard Setup Measurement Selection screen. To delete a Measurement, click the red X.
7. Change the Output Results Filter to “Top” or “Bottom” to show only the top or bottom “n” number of values, e.g. show the top 5 values for Assigned Strength.
8. Click the **Next** button to view the Time Period Setup screen.

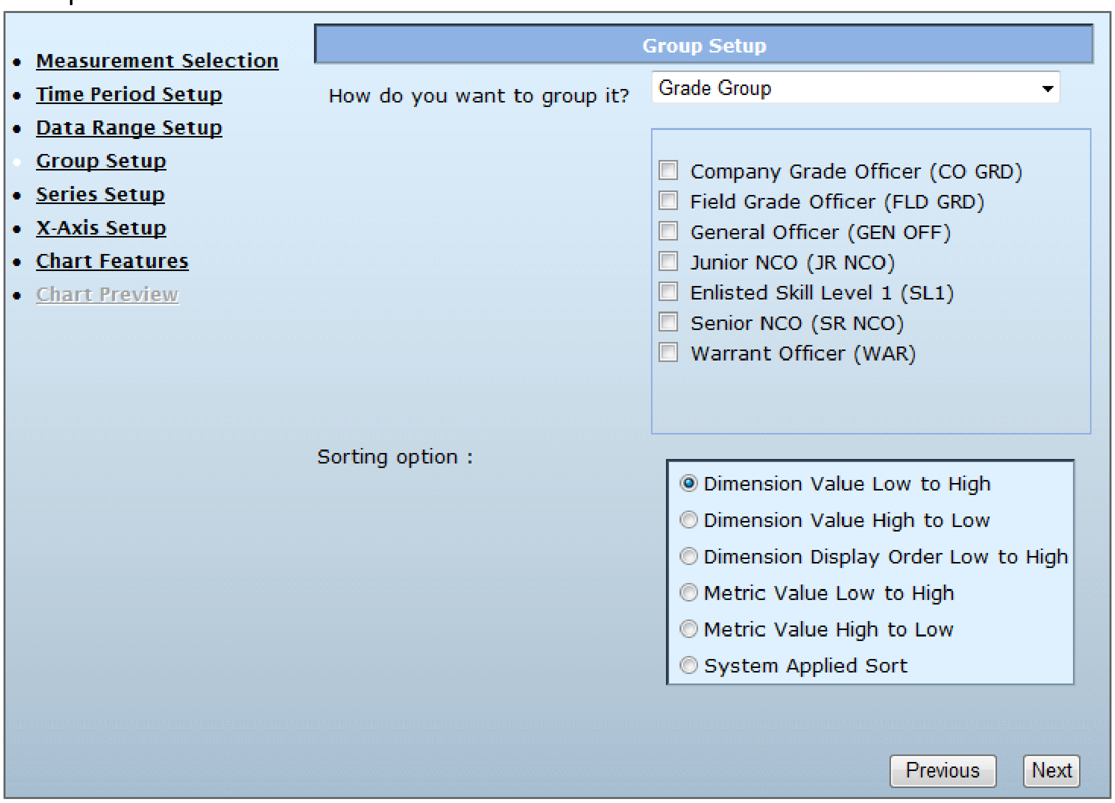


9. Using the radio buttons, choose a time period to be displayed on a horizontal axis of the chart. Click **Next**.
   Note: You can return to a previous page by clicking the **Previous** button.

10. Select how much data you would like to display on the chart. You can set a number of months, days, or years.



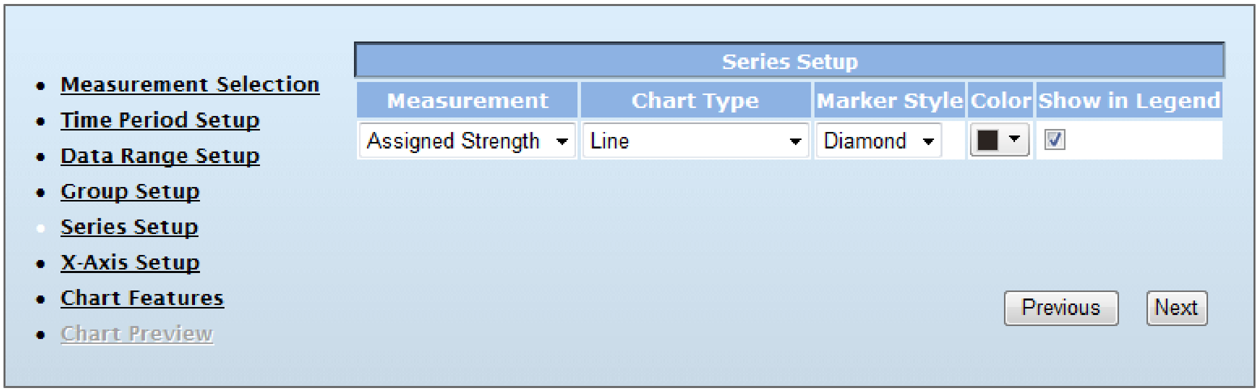
11. Choose to group the measurement you have chosen by a specific category, such as Grade Group.



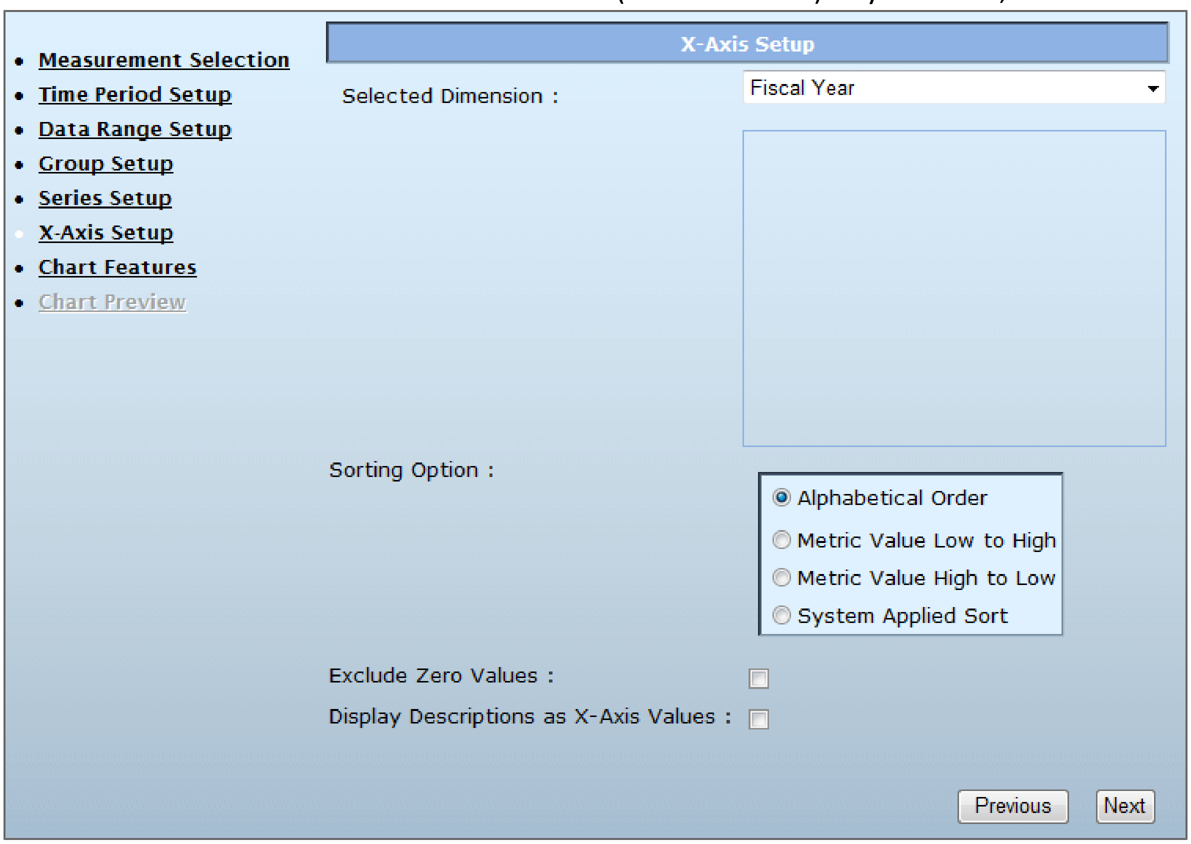
12. Click **Next**.
13. Choose the Chart Type, Marker Style, Color, and whether or not to show this information in the chart's Legend.

    Note: The Chart Types on page 102 details what each chart looks like.

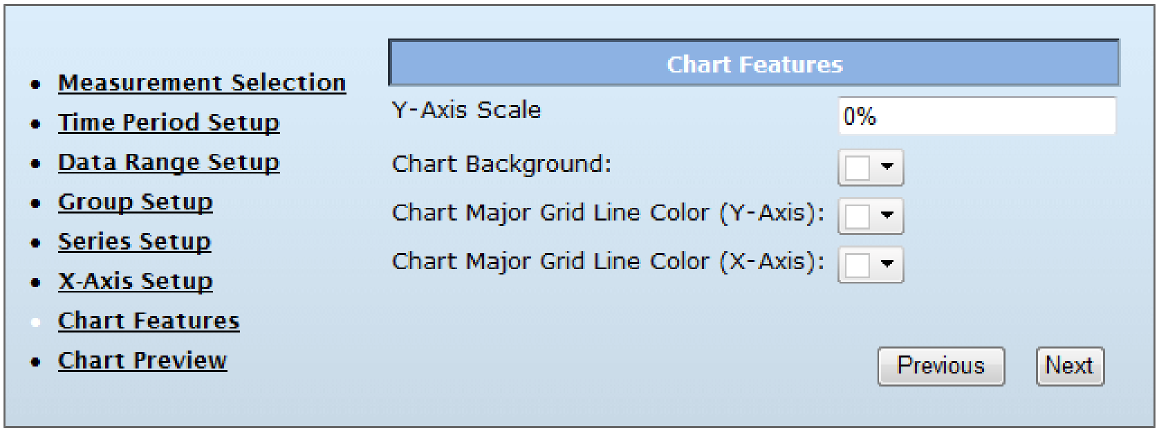
14. Click **Next**.



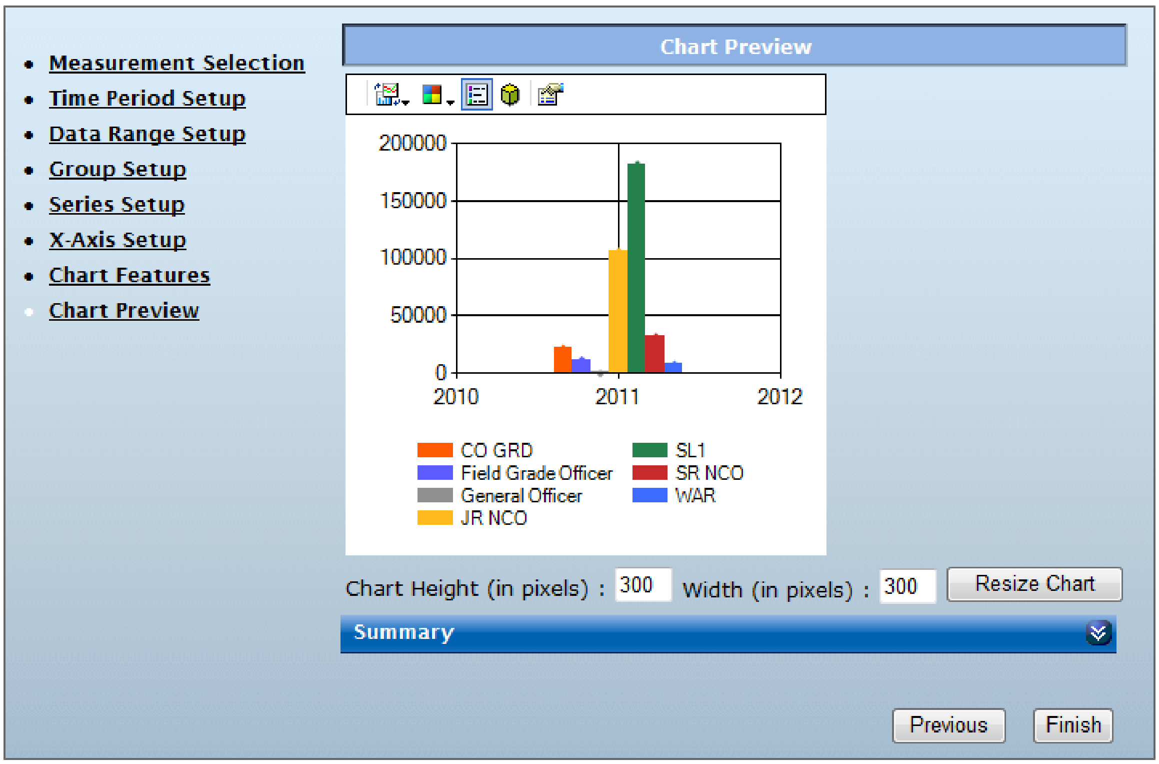
15. Customize the data that is shown on the X-Axis (horizontal axis) of your chart, and click **Next**.



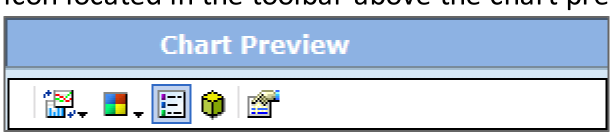
16. Make changes to the Y-axis Scale, Chart Background, or Y-Axis and X-Axis colors.



17. Make any changes in the Chart Preview screen.



18. Expand the Summary panel to see what the chart represents, or view a description of each icon located in the toolbar above the chart preview.



The following icons are available (from left to right):

- Select Chart Type
- Select Color Palette
- Toggle Chart Legend
- Toggle 3D View
- Properties

Using these icons, you can further modify the style, color, and properties of the chart. The properties icon affords you the most customizability, enabling you to show the values represented in the graph, turn on or off the y-axis and x-axis gridlines, change the background color of the chart, and even make the graph semi-transparent.

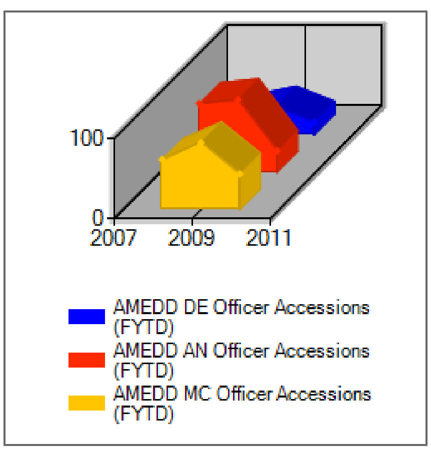
You can also resize the chart from this screen by choosing a height and width of the chart and clicking **Resize Chart**.

19. After all modifications are complete, click the **Finish** button.
    The chart is placed on the dashboard layout.

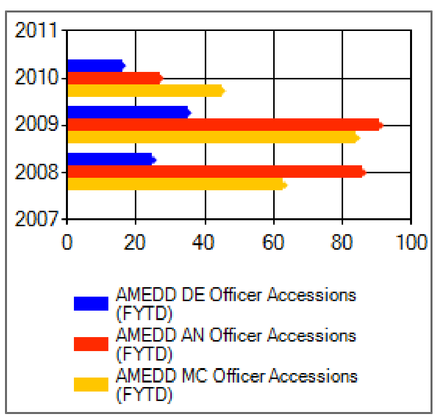
8.1.4.2.4.1 Chart Types

The following chart types are available for use in the Chart Wizard. Each chart type is accompanied by an image showing an example of the chart.

Area

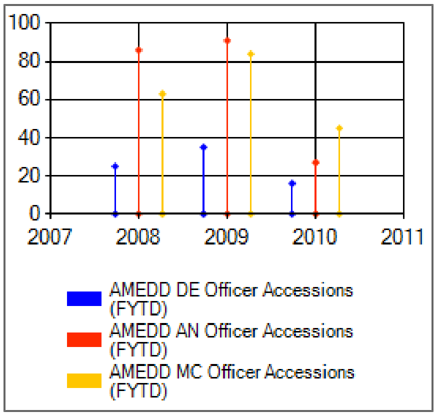


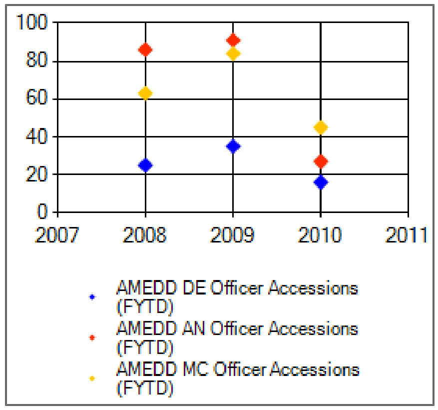
Bar



Box Plot

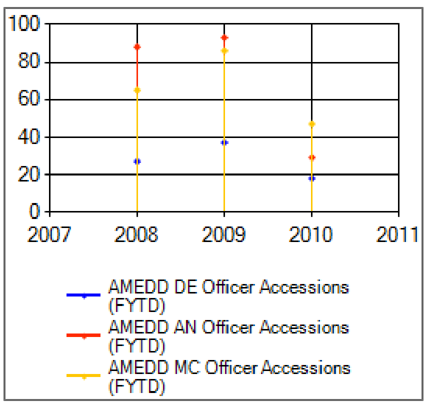
Bubble

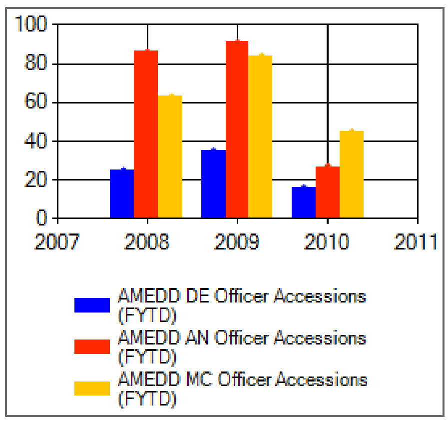




Candlestick

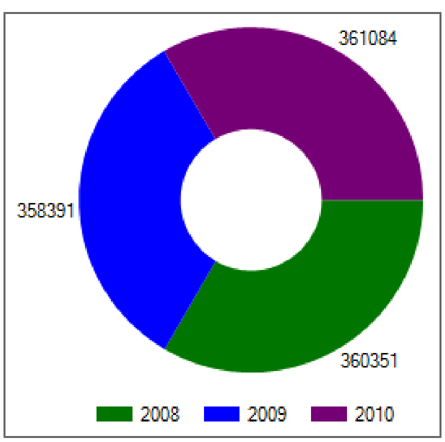
Column

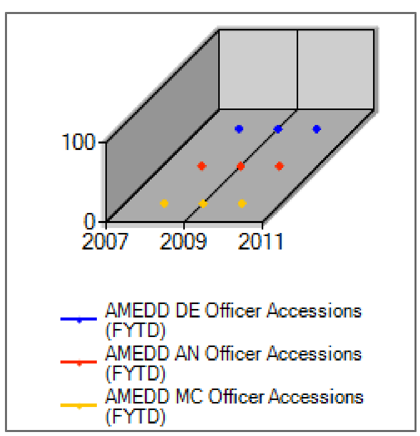




Doughnut

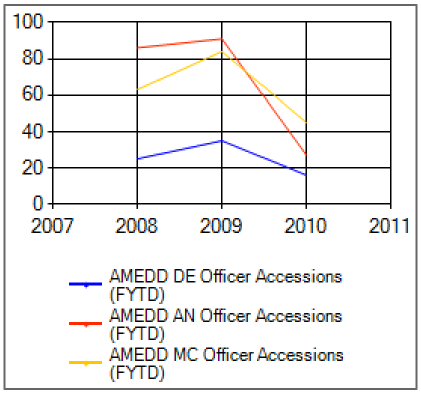
Error Bar

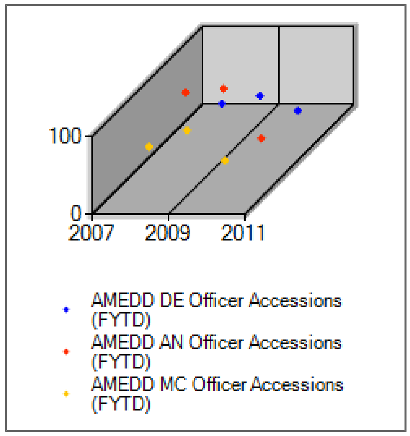




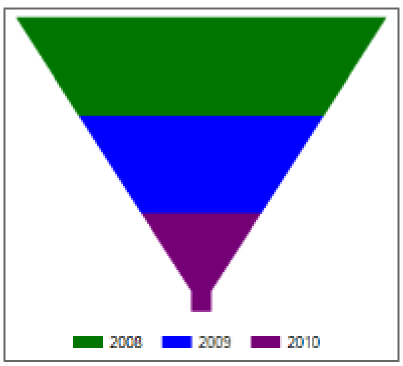
Fast Line

Fast Point

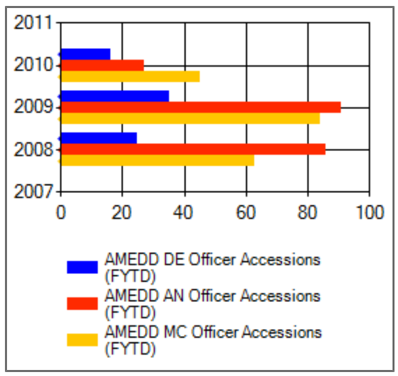




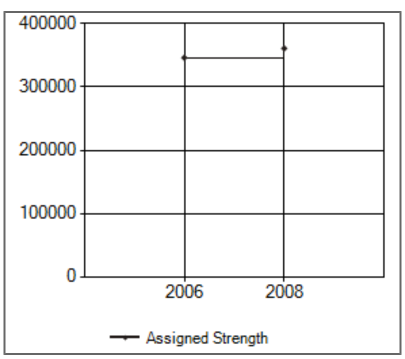
Funnel



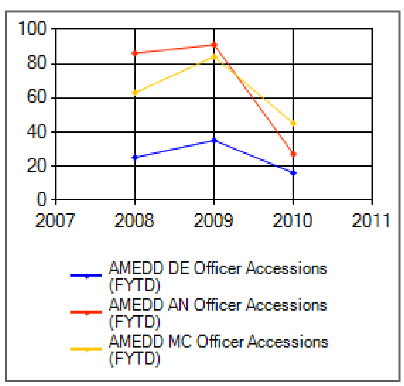
Gantt



Kagi

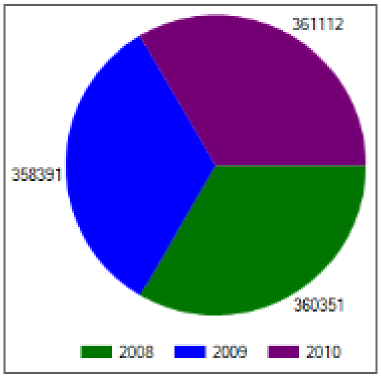


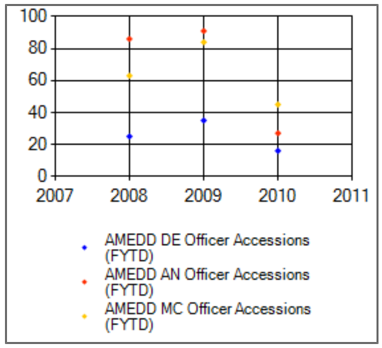
Line



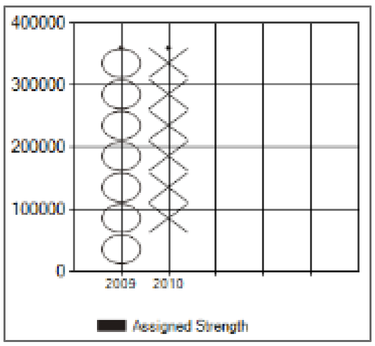
Pie

Point

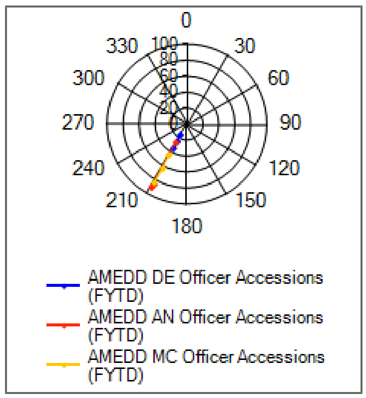




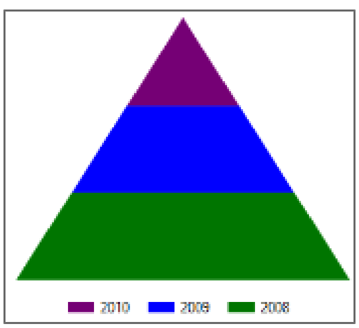
Point and Figure



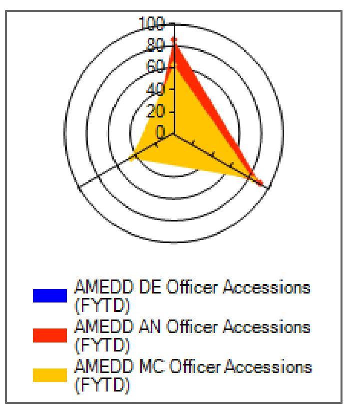
Polar



Pyramid

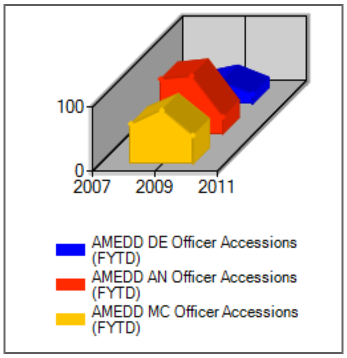


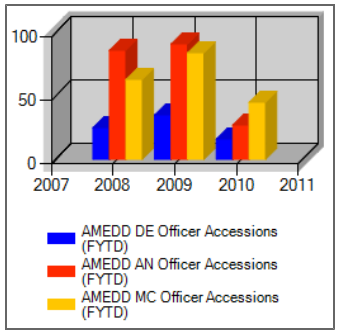
Radar



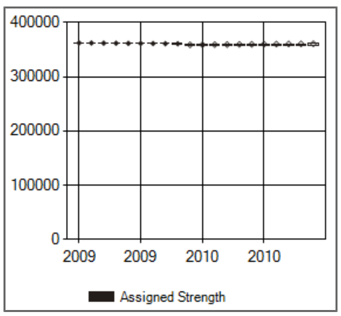
Range

Range Column

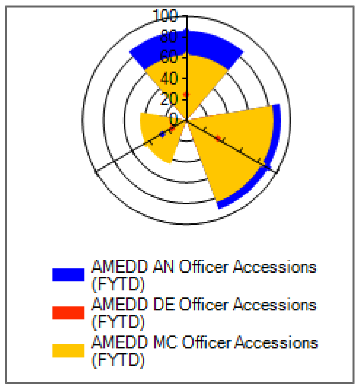




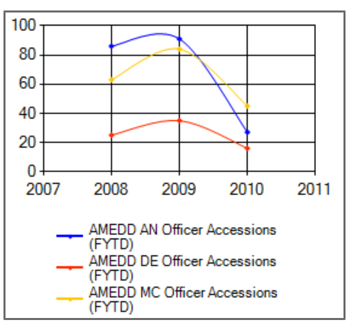
Renko



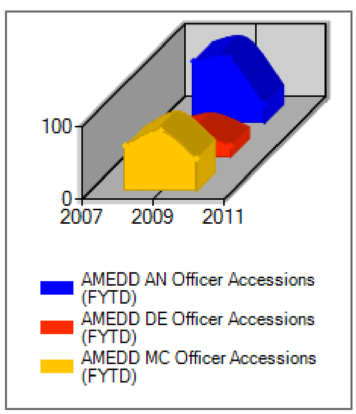
Rose



Spline

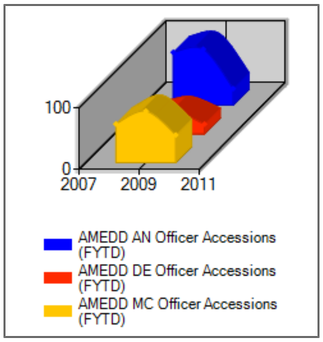


Spline Area

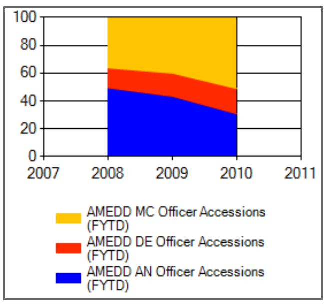


Spline Range

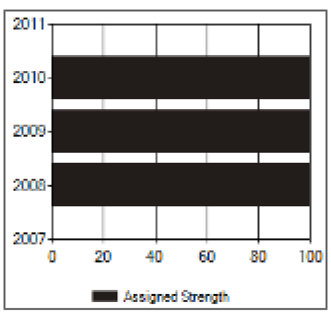
Stacked Area



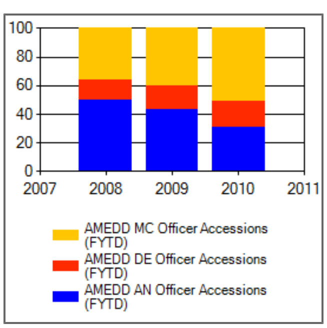
Stacked Area 100

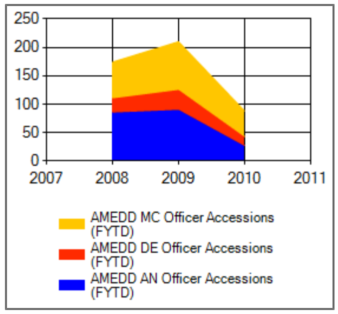


Stacked Bar 100

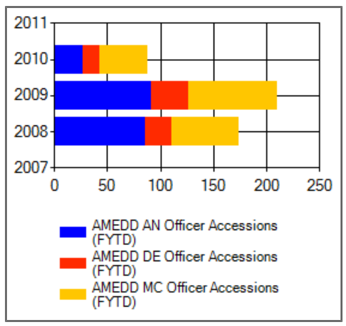


Stacked Column 100

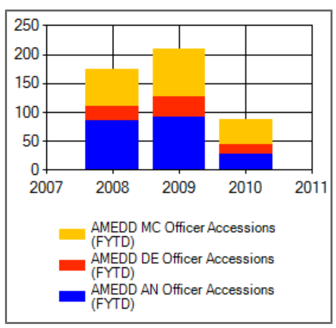




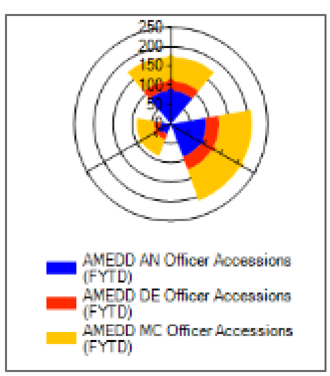
Stacked Bar



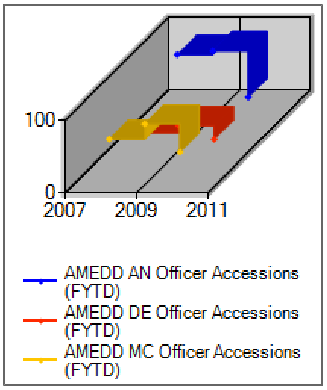
Stacked Column



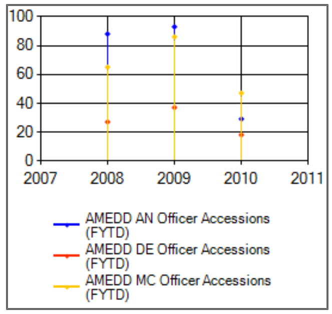
Stacked Rose



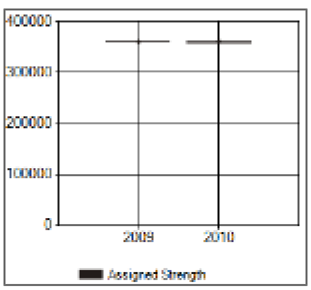
Step Line



Stock



Three Line Break

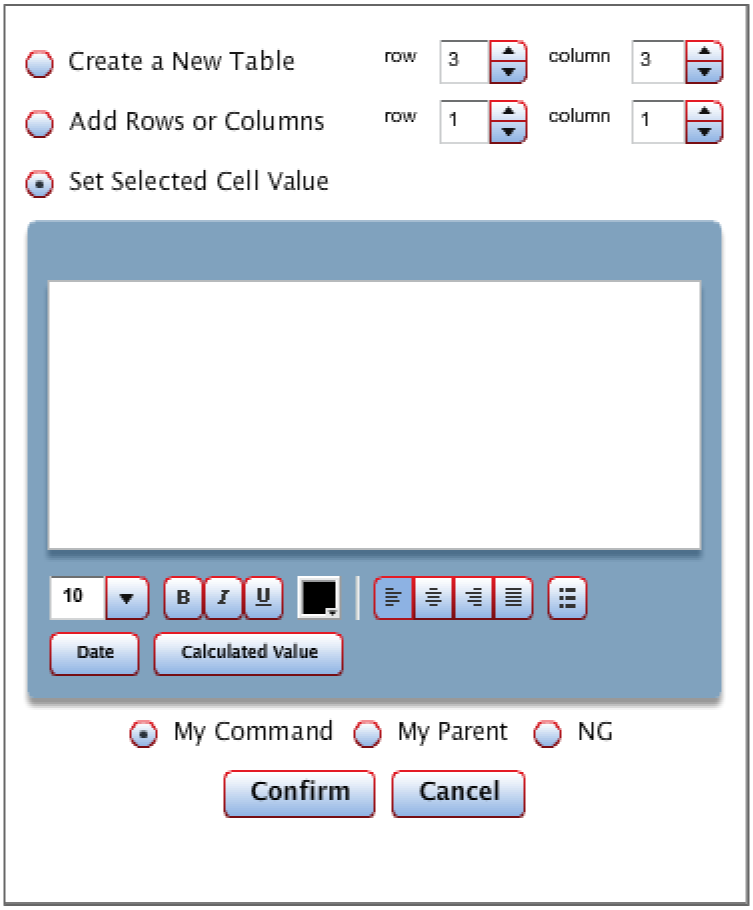


8.1.4.2.5 Table

The Table functionality allows you to insert a table of a defined size and customize the information that is contained within it. Using this feature, you can include measurements in different cells of the table, insert standard text, add and delete rows and columns, and resize the table to fit your needs.

8.1.4.2.5.1 Creating A New Table

1. Click the Table icon ( ).
   The following screen appears.



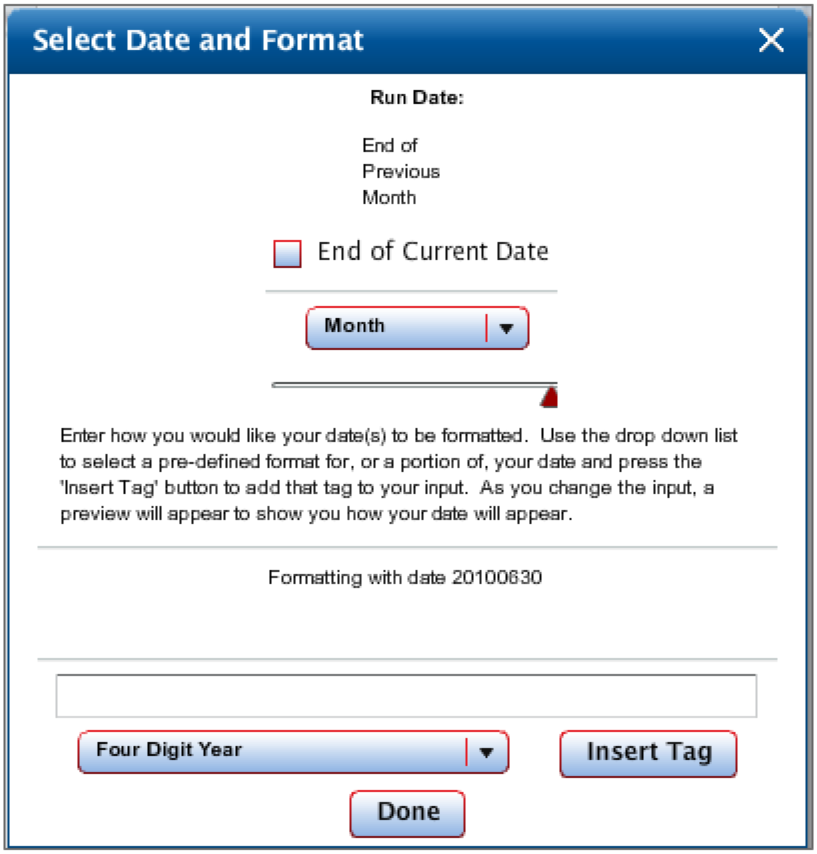
2. Select the “Create a New Table” radio button.
3. Modify the number of rows and columns the table will include.
4. Click **Confirm**.

   The table appears on your Dashboard.

8.1.4.2.5.2 Inserting Dates Into Cells

1. Select a cell in the table and click **Edit Element Data**.

2. Click **Date**.
   The following screen appears.



3. Click the **Month** drop-down menu to change the period of time.

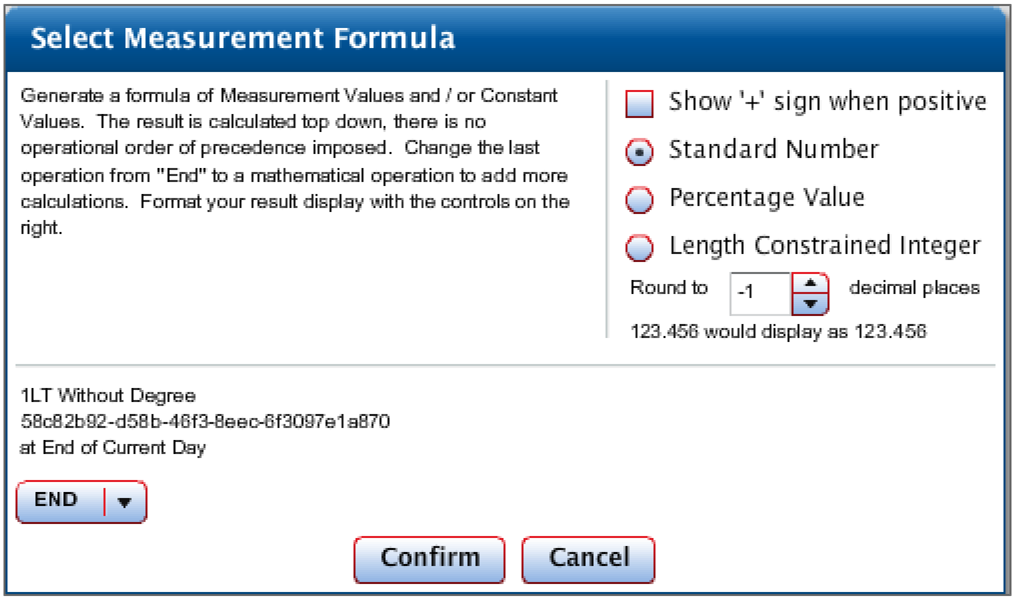
Drag the red triangle to a specific point in time.
Note: To view the most recent data available, select the "End of Current Date" checkbox.

4. Choose how to format the date string you have selected by clicking the **Four Digit Year** drop-down menu.
5. After choosing how to format the date string, click **Insert Tag**.
6. Click **Done**.
   The date string you have chosen appears in the selected cell of your table.

8.1.4.2.5.3 Inserting Measurements Into Cells

1. Select a cell in your table and click **Edit Element Data**.
2. Click **Measurement**.
3. Choose a measurement from the available list.
4. Select a run date for the measurement you have chosen.

5. Click **Confirm**.
   The following screen appears.



6. Choose how many decimal places you would like to show, whether you want to show a percentage, or if you'd like to show a '+' when the value is positive.
7. Click the **End** drop-down menu to choose a function—addition, subtraction, multiplication, or division—to apply to another measurement.
8. When you are finished, click **Confirm**.
9. Customize how you would like the measurement to appear by changing the color, size, and location of the measurement.
10. Click **Confirm**.

8.1.4.2.5.4 Changing The Command Value For A Measurement

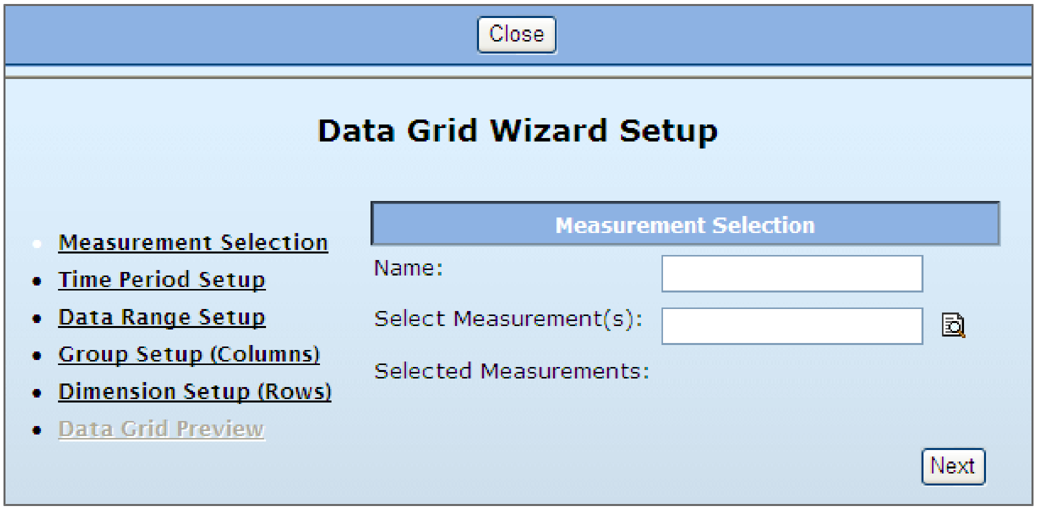
1. Select a cell in your table and click **Edit Element Data.**

Note: The cell you select could either contain no data or a previously selected measurement.

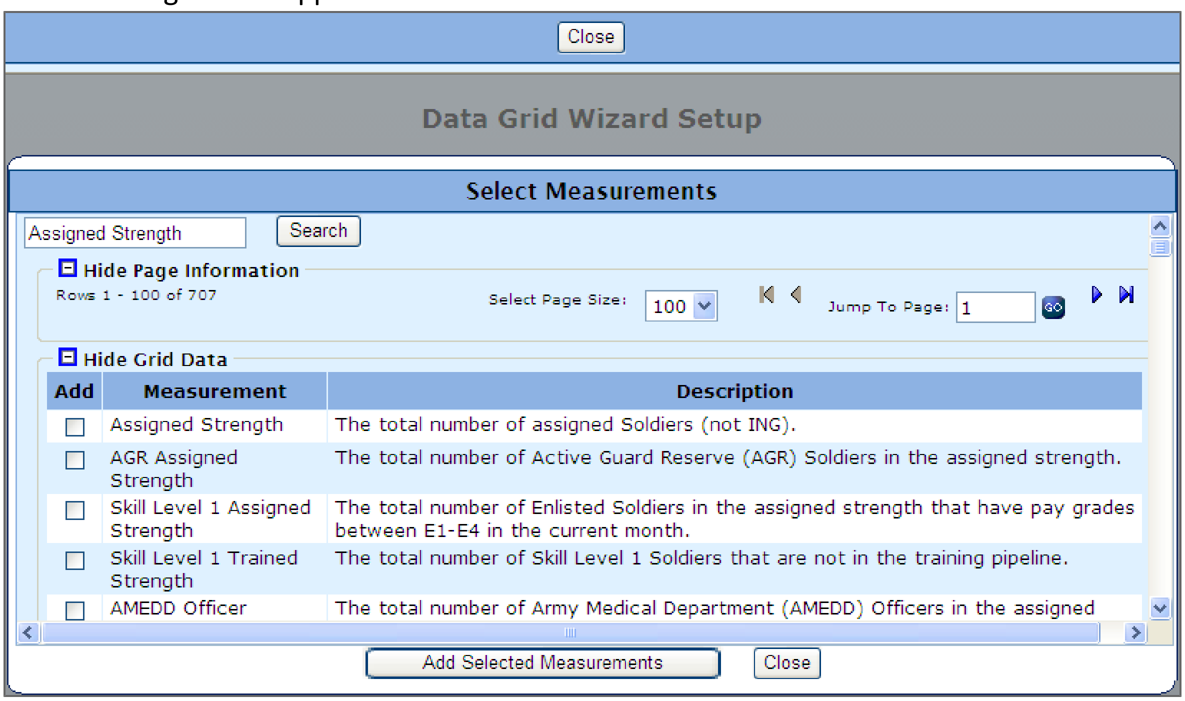
2. Highlight the measurement, or select one if there isn't one already in the cell.
3. Select the radio button—My Command, My Parent, or NG—for which you wish to view data.
4. Click **Confirm**.
5. The data in the selected cell now shows values for the command level you chose, either My Command, My Parent, or NG.

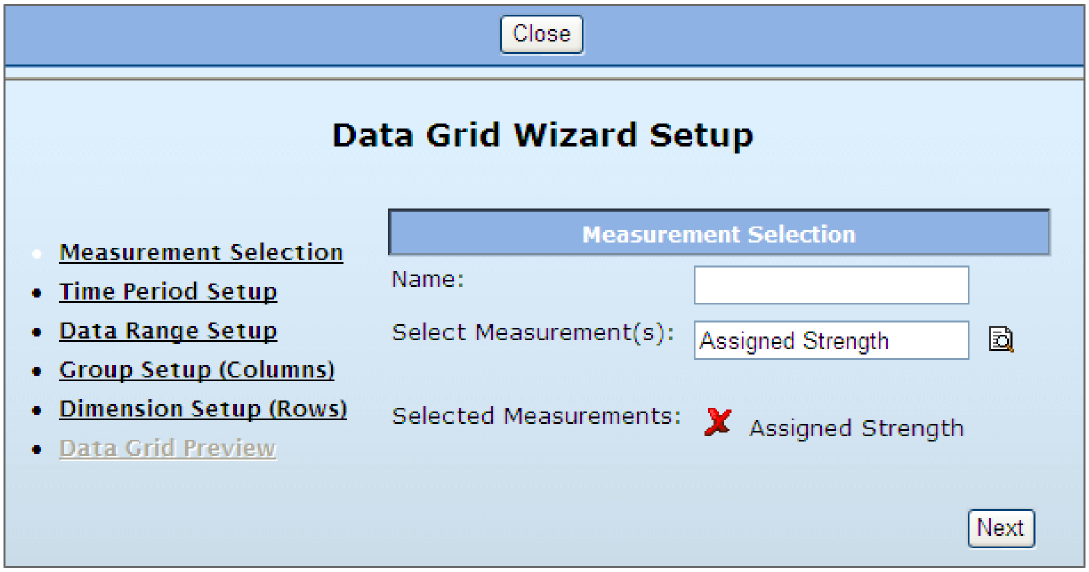
8.1.4.2.6 Data Grid Wizard

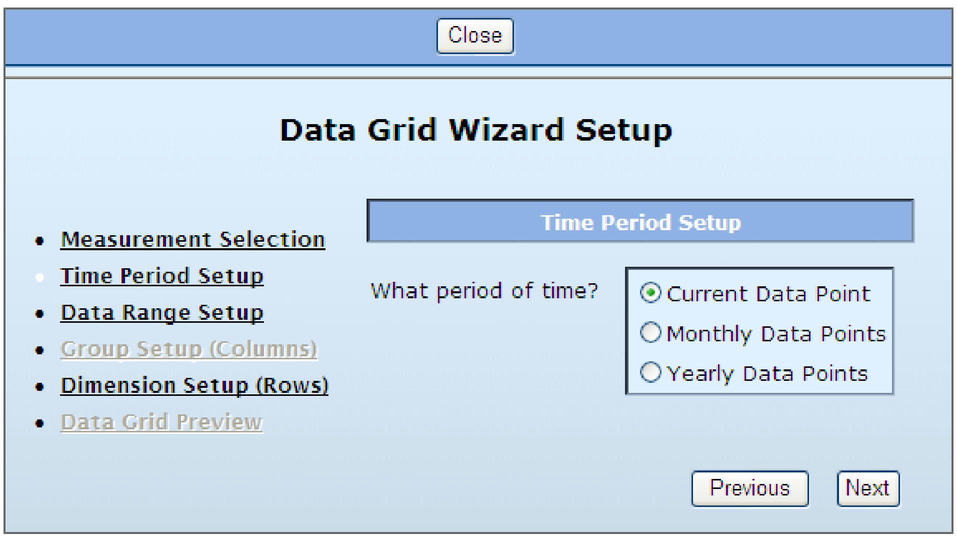
1. Click the **Data Grid Wizard icon** ().
   The following screen appears.



2. Type “Assigned Strength” into the text field next to Select Measurement(s) and click the magnifying glass icon.
   The following screen appears.

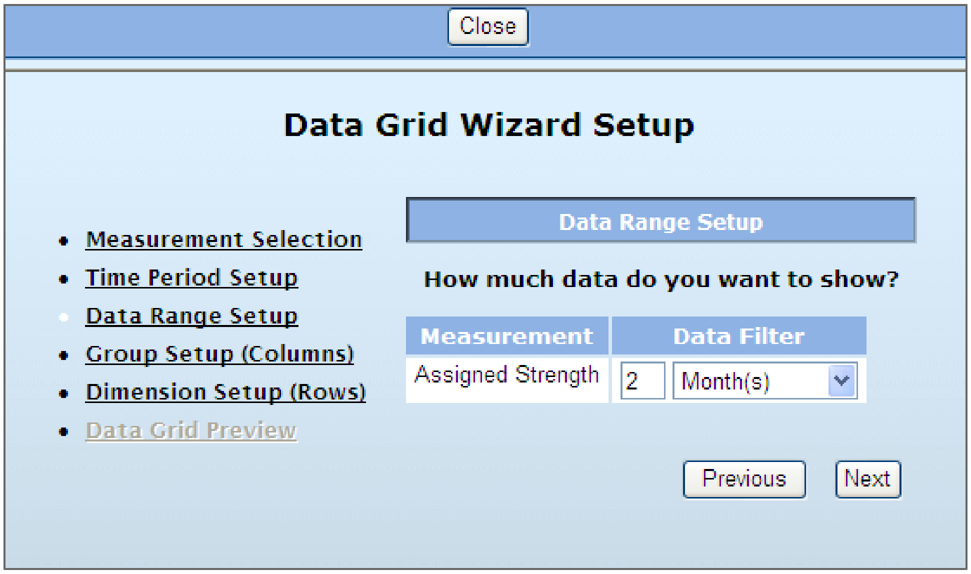


3. Select a measurement.
   The window closes and shows your selected measurement.
   

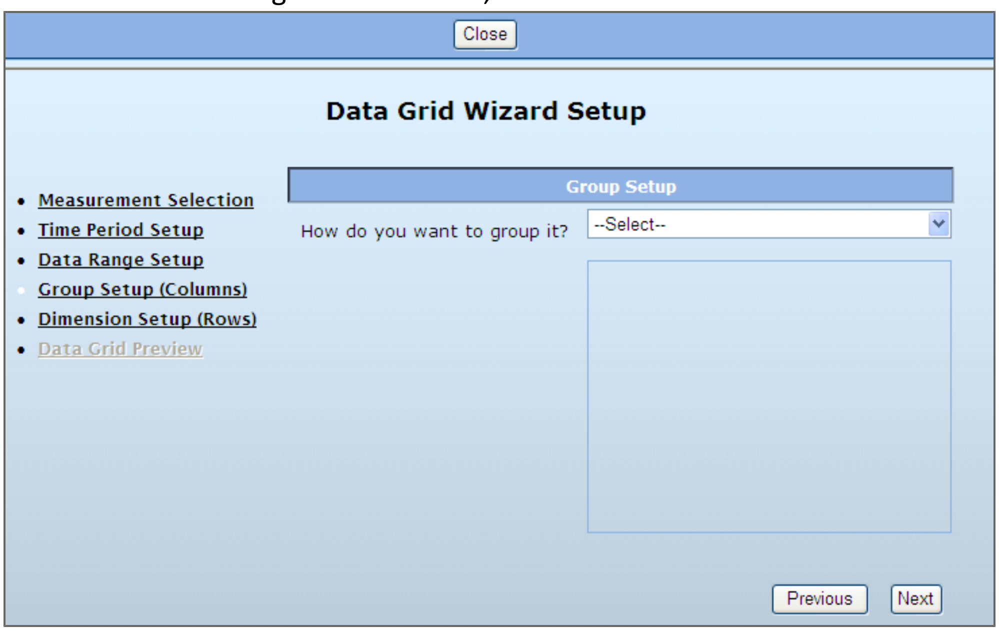
4. Click **Next**.
5. Choose to view current data, plot data for each month, or plot a single data point for a specific number of years. For this demonstration, select the second radio button, "Monthly Data Points."
   

6. Click **Next**.
7. Decide how much data you would like to view, and whether you want to view data for Months, Years, or the Previous Year.
   Note: If you select Year or Previous Year, you will then be asked to select between Fiscal

Year, Rolling Year, or Calendar Year.

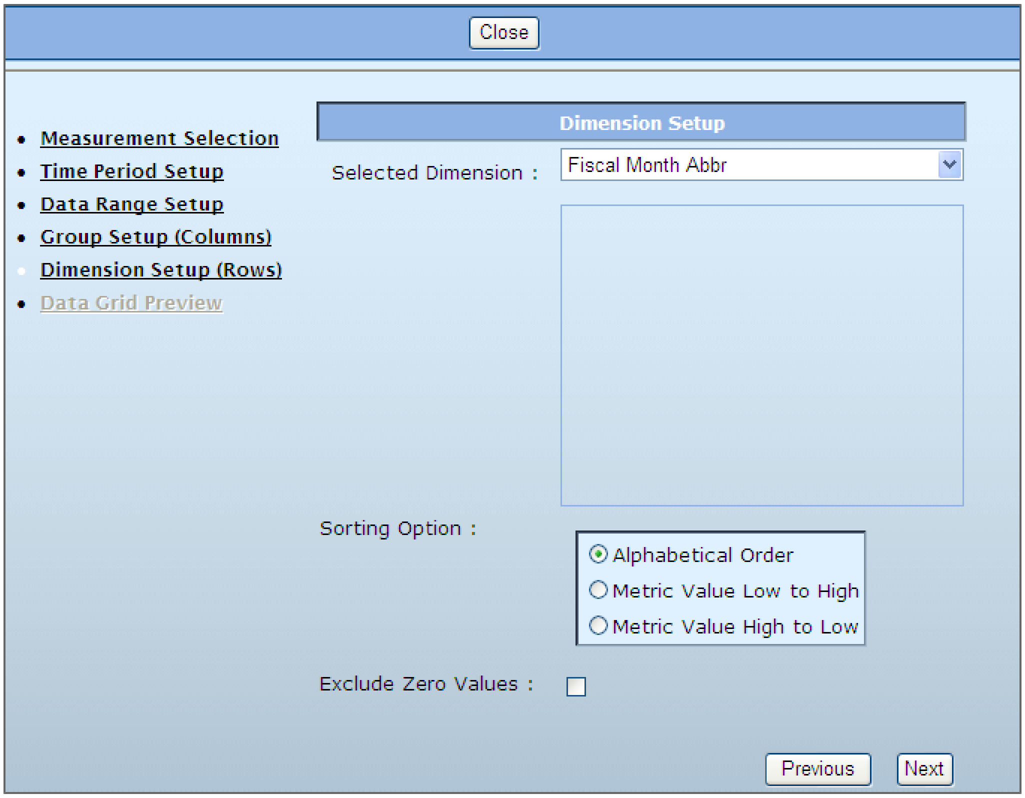


8. Click **Next**.
9. Decide whether or not you'd like to group the metric by a specific value, and if you'd like to order the data from greatest to least, or vice versa.

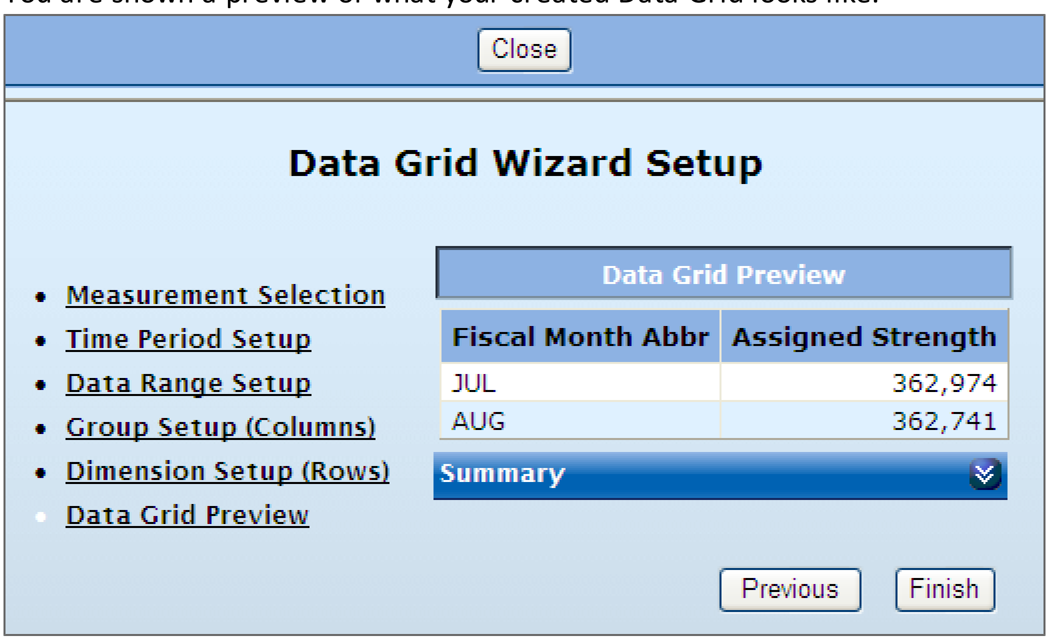


Note: When selecting two or more measurements, or an option other than showing the current data, you will be unable to sort the data from greatest to least or vice versa.

10. Click **Next**.
11. Select the dimension you would like to view in the Data Grid.



12. Click **Next**.
    You are shown a preview of what your created Data Grid looks like.

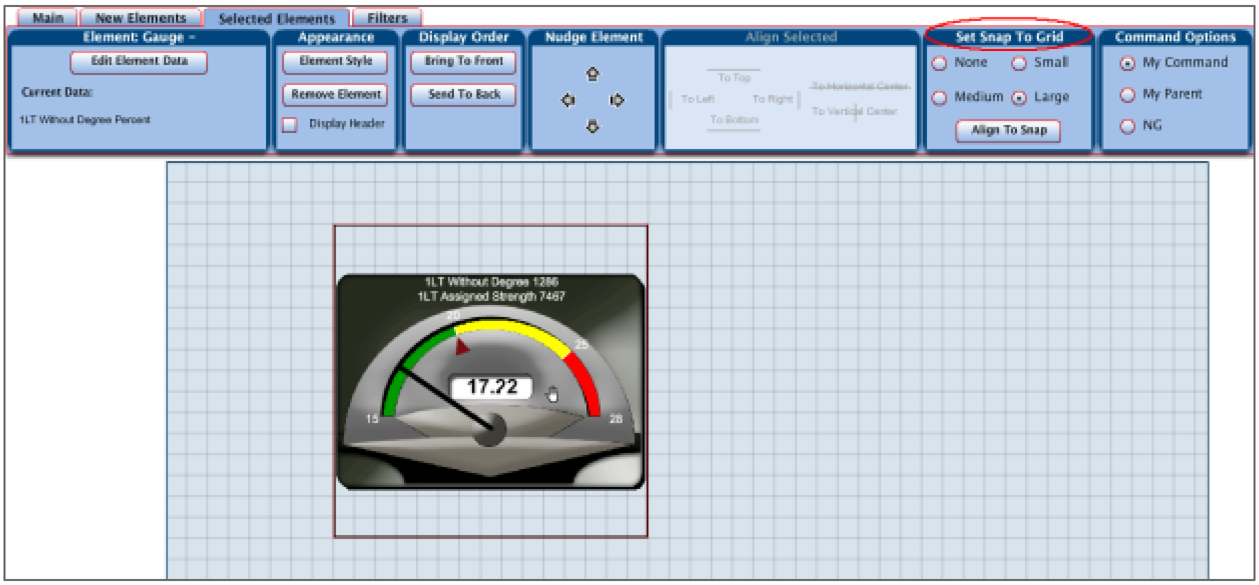


13. Click **Previous** or any tab on the left side of the screen to modify any of your selections, including measurement, dimension, and the time period for which you are viewing data.

14. Click **Finish** to show the completed Data Grid on your dashboard.

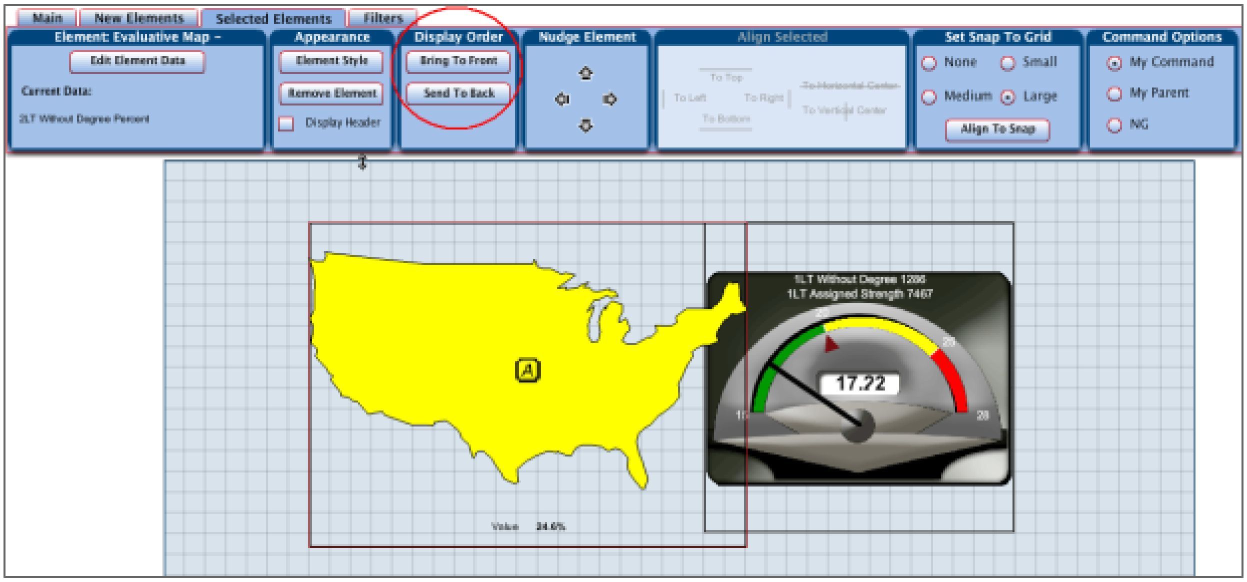
8.1.4.3 Selected Elements Tab

Once you have added an element into the dashboard, you can change the data, align the image with a variety of grids, and change the style and border of the image, among other things. To change the position of an element, such as a Gauge, use the options provided in the Element Position section of the Selected Elements tab. You can set a grid of a desired size by choosing one of the **Set Snap to Grid** radio buttons and moving the Gauge within the grid by either clicking one of the **Nudge Element** arrows or by clicking the **Align To Snap** button.

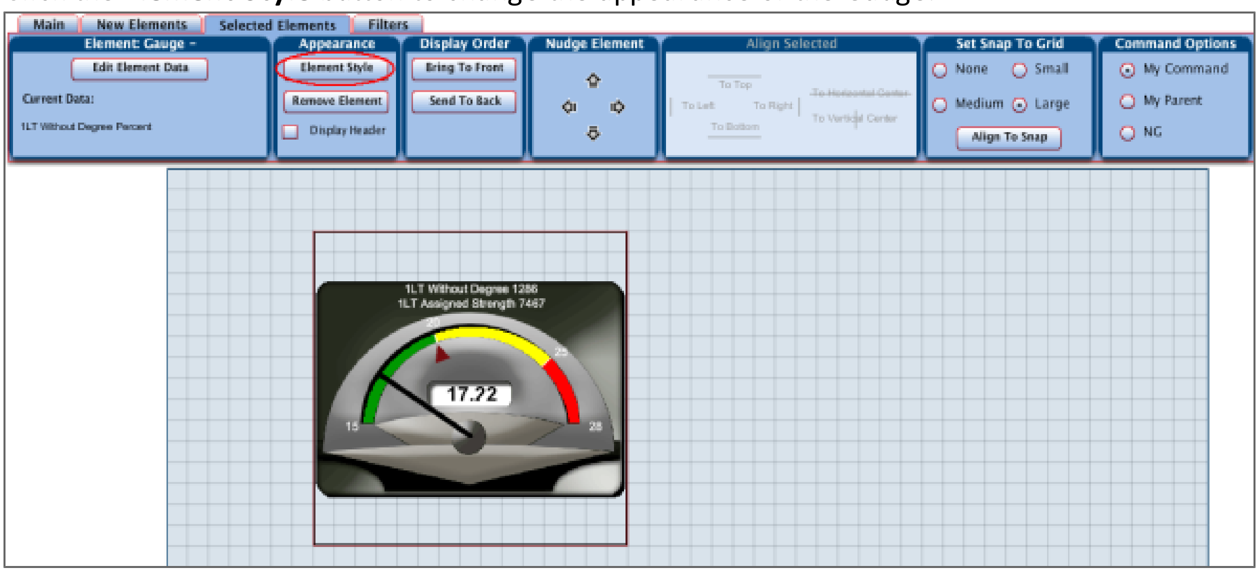


If there is more than one element displayed on the layout and the images overlap, you can bring a desired image to the front of the overlap, or send it to the back of the overlap by clicking the **Bring to**

Front and **Send to Back** buttons.

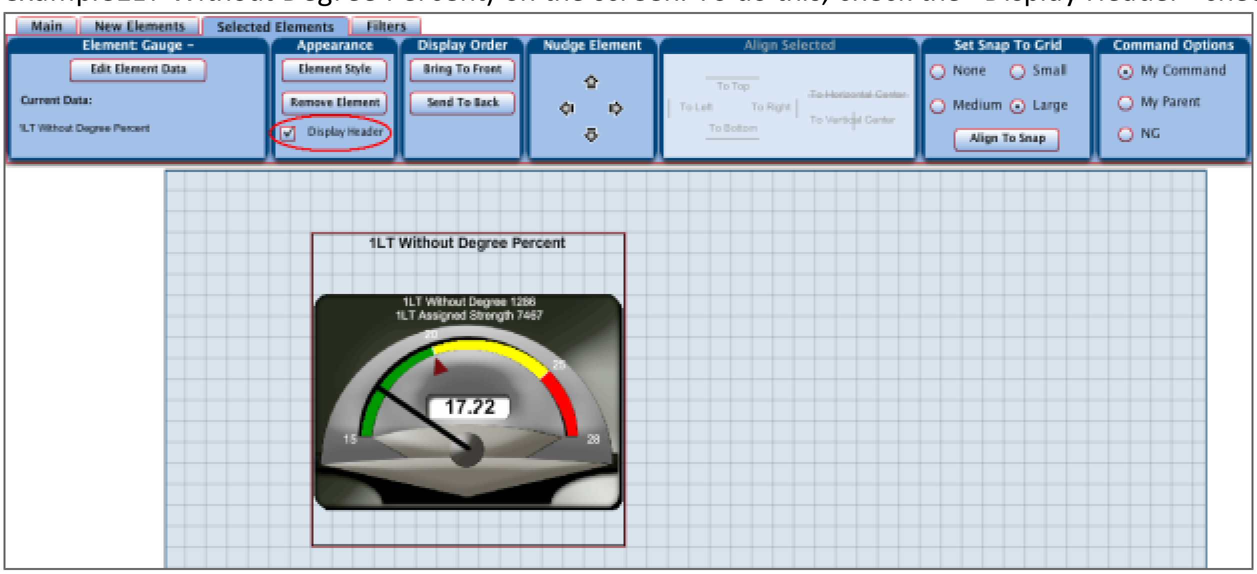


Click the **Element Style** button to change the appearance of the Gauge.

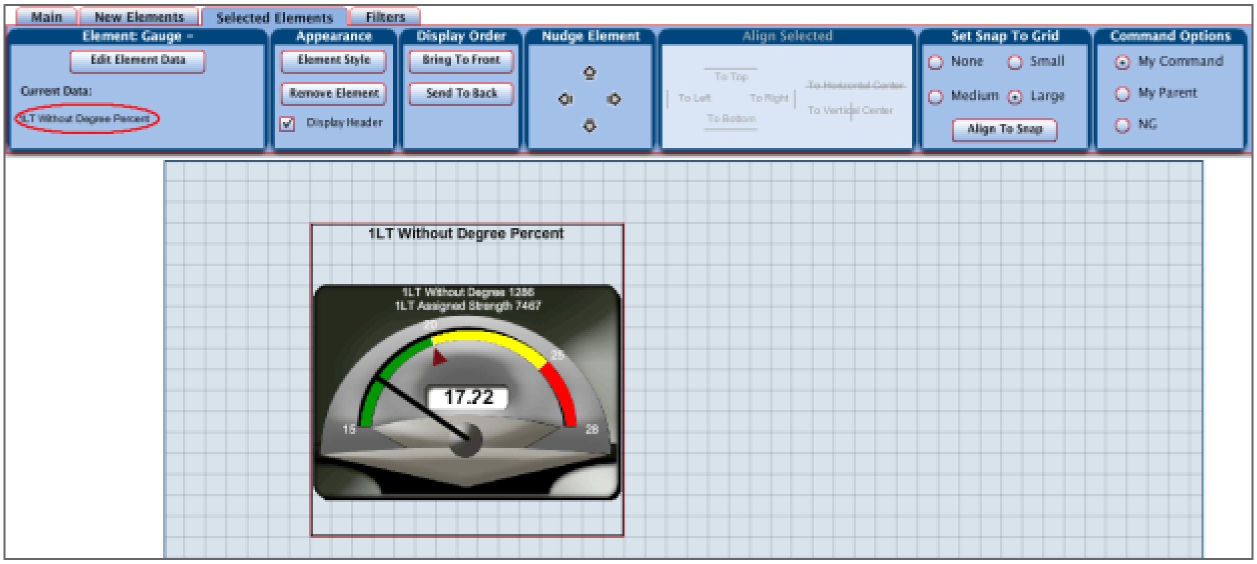


The pop-up menu that appears allows you to select the color and style of the background and border of the Gauge image.

There is an option to display a title of the measurement currently shown on the Gauge (in this example1LT Without Degree Percent) on the screen. To do this, check the “Display Header” checkbox.



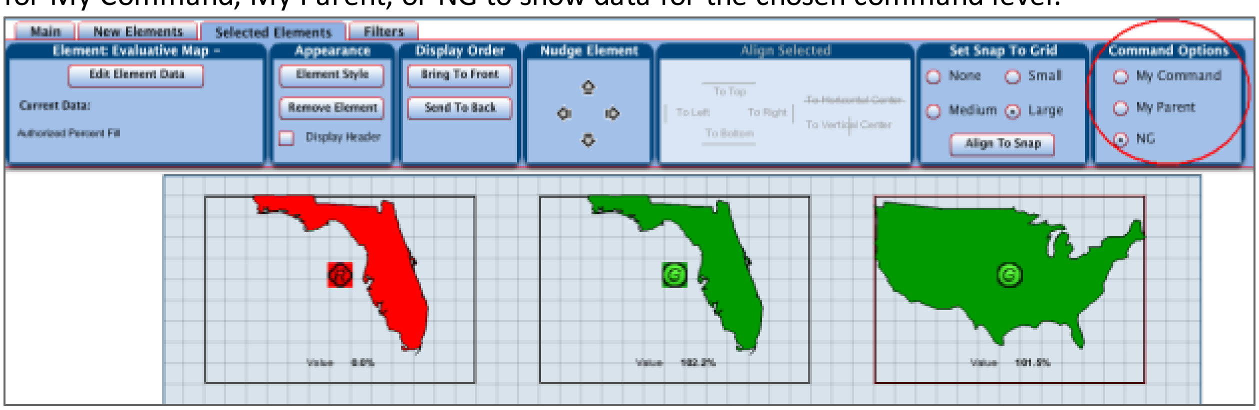
Notice that the Gauge data (the title of the metric currently displayed on the Gauge, in this example 1LT Without Degree Percent) is shown in the Element Data Section.



To select a different measurement to be displayed on the Gauge and replace the previous measurement, click the **Edit Element Data** button. The resulting pop-up menu will let you select the new measurement.

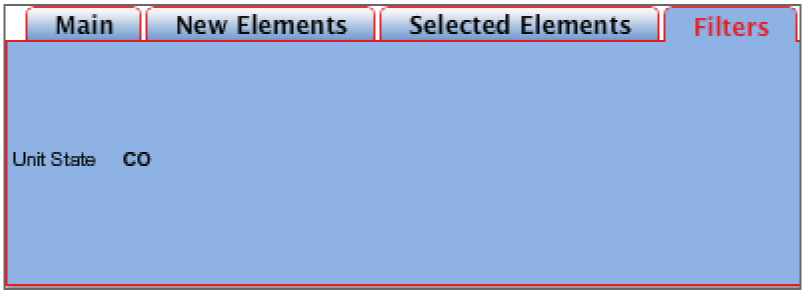
To remove the image of the Gauge from the layout, click the **Remove Element** button.

Finally, the “Command Options” section of Advanced Dashboard allows you to show multiple levels of data on one dashboard. For example, if you change your Command Navigator to the state of Florida, with a specific Parent Organization Designator, you will be able to see the Evaluative Map for the POD, the state of Florida overall, and the United States Army Reserve overall. After selecting the Evaluative Map (or any other element), simply click the Selected Elements tab, and click the radio button for My Command, My Parent, or NG to show data for the chosen command level.



8.1.4.3.1 Filters Tab

This tab shows the user any current filters selected in the application. For example, if the Command Navigator is set to the state of Colorado, this setting will appear in the Filters tab.

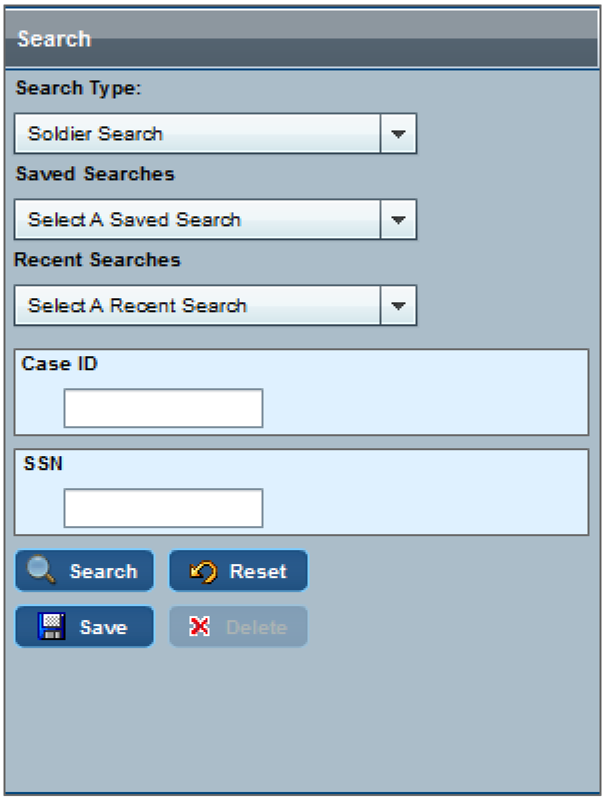


9 Appendix C

Appendix C references additional functionality included within RMS, including the Search and Preferences toolbars, along with the Rucksack feature.

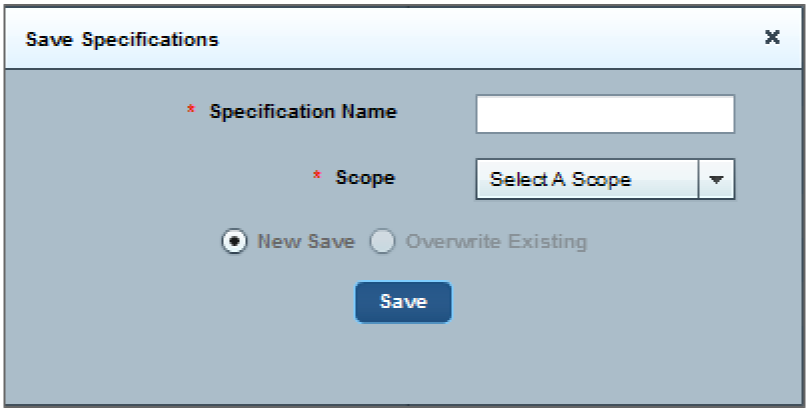
9.1 Search

Users are also able to Search for Soldiers within the application by selecting the Search accordion menu tab from the Command Center. Users are able to search for Soldiers by choosing the appropriate “Search Type.”



1. Enter the Soldier’s SSN and click **Search**.
   Or
   Enter the Soldier's full case ID, and click **Search**.

2. Click **Save** after entering search parameters to save a search for later use.



3. Enter a name for the search.
4. Choose the scope for the search, either Private or Public.
5. Choose to overwrite an existing save, or save the search as something entirely new.
6. Click **Save**.

   The search is saved and can be used again at a different time.

9.1.1 Saved Searches

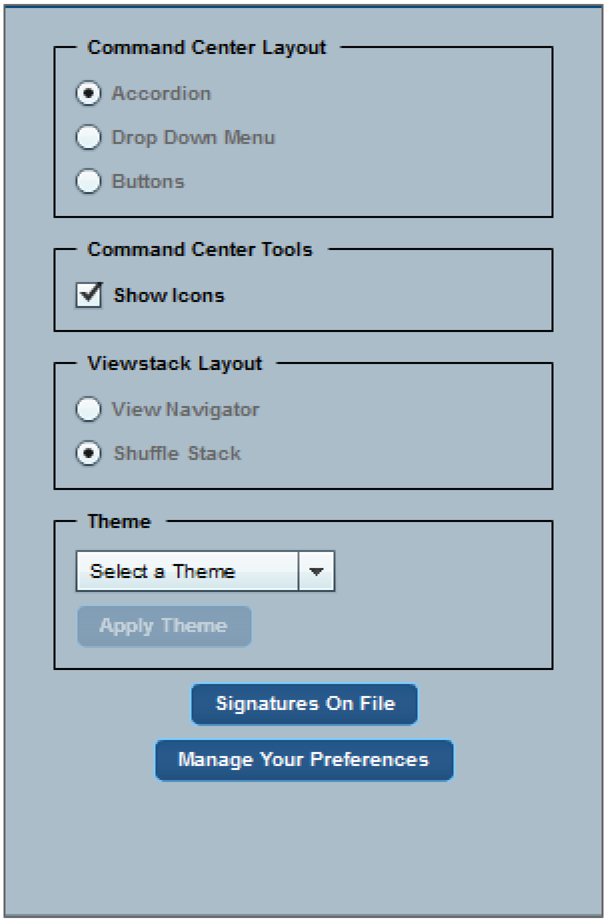
From the "Saved Searches" drop-down menu, users can choose to view the criteria for any previously saved search.

9.1.2 Recent Searches

From the "Recent Searches" drop-down menu, users are able to view the search criteria from their recent searches.

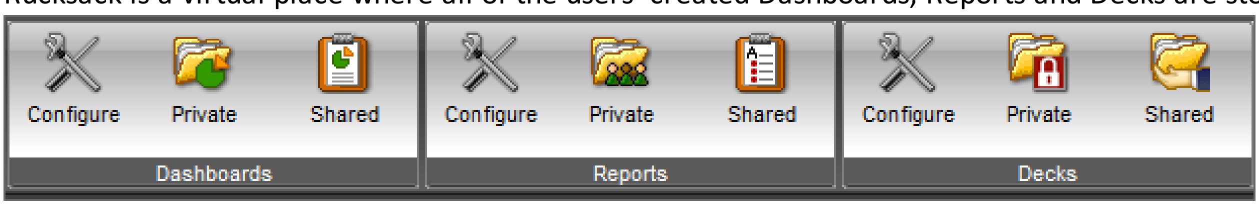
9.2 Preferences

The Preferences tab allows users to customize the look of the application. From here, they can determine how the Command Center Layout should look, choosing from the “Accordion” menu, a “Drop-Down Menu,” or “Buttons.” They can also decide whether or not to show icons within the Command Center Tools, and whether they would like the Viewstack Layout to use a “Shuffle Stack” or “View Navigator.” Finally, users can choose from different themes available within the application.



9.3 Rucksack

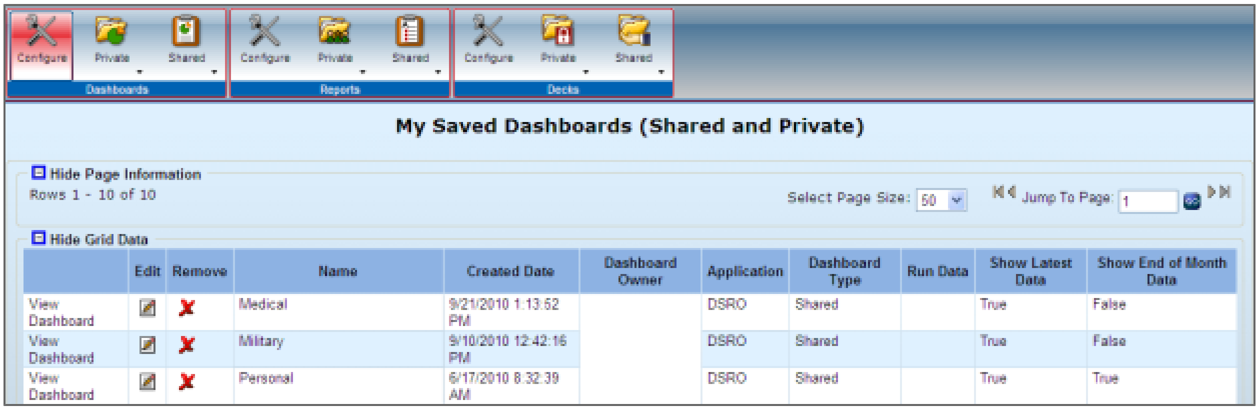
Rucksack is a virtual place where all of the users' created Dashboards, Reports and Decks are stored.



Notice that Rucksack has a separate section for Dashboards, Reports and Decks. The functionality of each section is very similar.

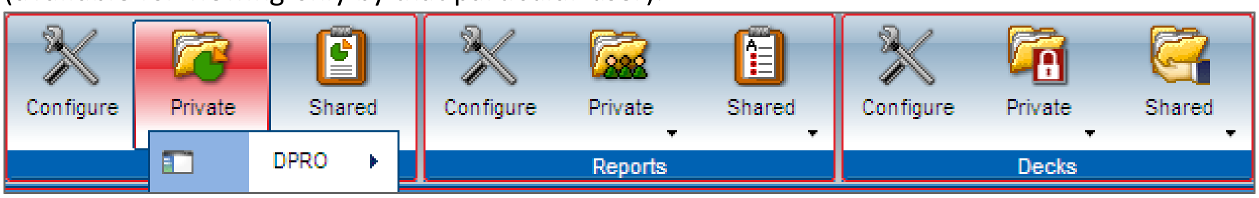
9.3.1 Rucksack Dashboards

Click the **Configure** icon within the **Dashboards** section. You will see a list of your Saved shared and private dashboards. Note that the list shows the name of the dashboard and an application it falls under.

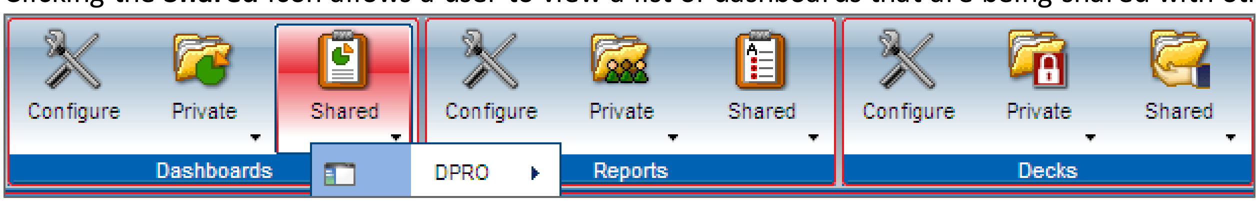


To view a Dashboard, click the **View Dashboard** link. To delete a Dashboard, click the red X in the remove column.

Clicking the **Private** icon allows a user to view a list of dashboards that have been stored as private (available for viewing only by that particular user).



Clicking the **Shared** icon allows a user to view a list of dashboards that are being shared with others.



Note the right-pointing arrow next to DPRO. The arrow indicates that there are multiple shared dash-boards available for viewing.

9.3.1.1 Adding A Background Image To Your PowerPoint Slide

After accessing your created Advanced Dashboard in the Rucksack, you can add images to the back-ground before exporting it to PowerPoint.

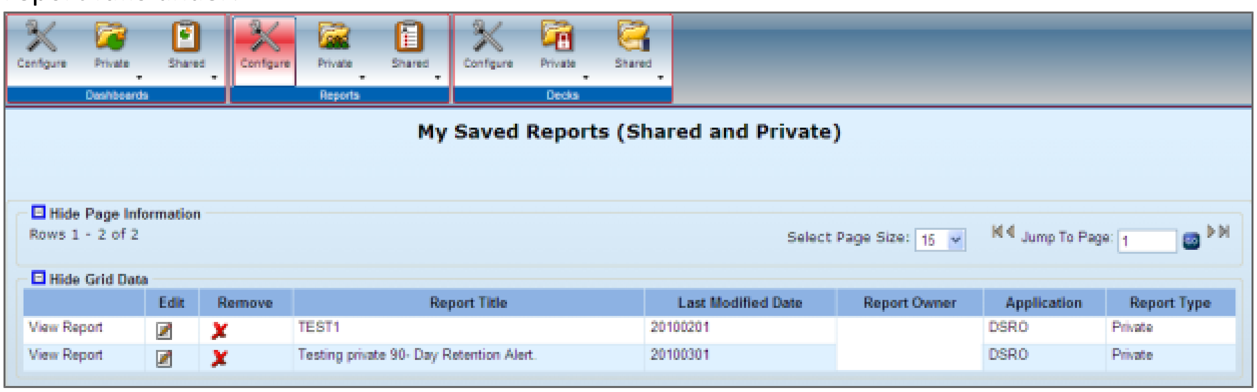
1. Select your created Advanced Dashboard.
   The dashboard appears on the screen with the Advanced Dashboard toolbar above it.
   Note: If the Advanced Dashboard toolbar does not appear, you will only be able to add metric

boxes to the dashboard, and will be unable to change its background.

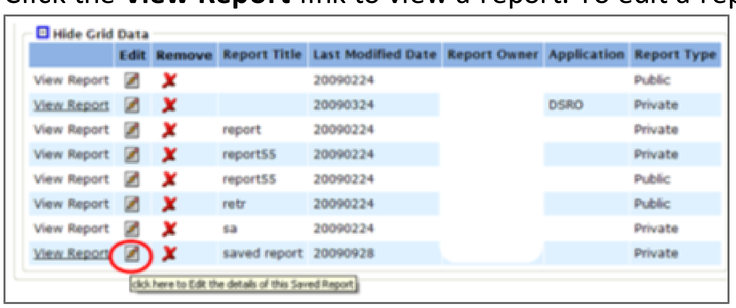
2. Ensure that the **Edit Mode** check box is selected in the Main tab.
3. Click the **Image** icon in the New Elements tab.
   A pop-up window opens, allowing you to choose an image to add to the dashboard.
4. Select an image and place it on the dashboard.
5. Resize it as desired.
6. Click **Send to Back**. The image appears in the background of your dashboard.
7. Click **Save Current**.
8. Click the **PowerPoint** button to export the image to PowerPoint.

9.3.2 Rucksack Reports

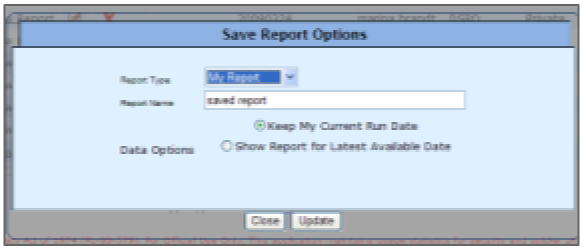
Click the **Configure** icon within the Reports section. You will see a list of your saved Shared and Private reports. Note that the list shows Report Title, Report Type (Private or Shared), and an application the report falls under.



Click the **View Report** link to view a report. To edit a report, click the **Edit** icon.



The **Save Report Options** pop-up window appears.

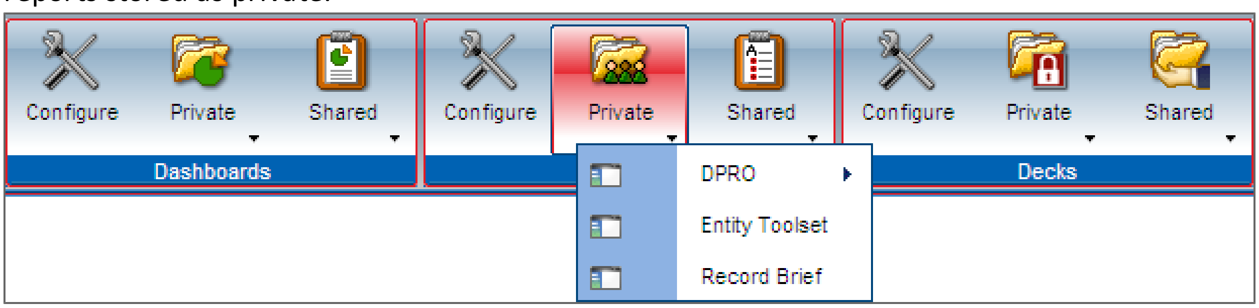


A user may choose how to save the report. The Report Type can be selected as either My Report or as a Shared Report. Note that if you choose the **My Report** option, the report will be stored in the Ruck-sack as a private report.

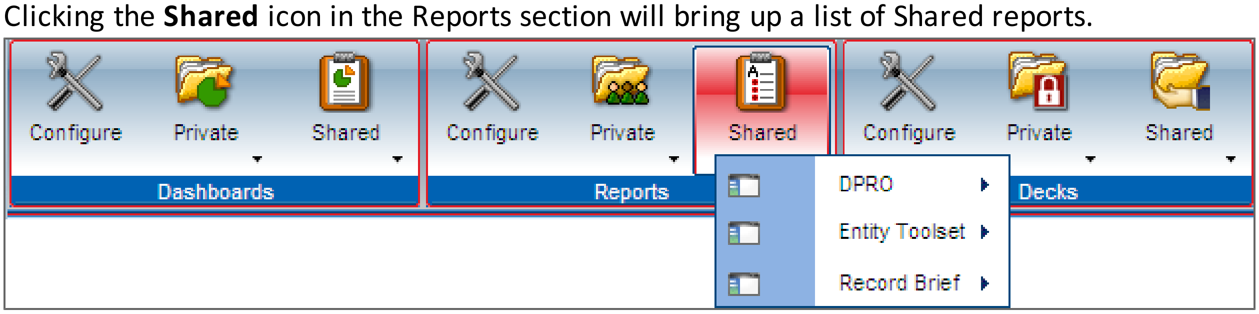
A user may keep or modify the Report Name, and may choose to either keep the current Run date or show the report for the latest available date. Click the **Update** button to confirm your selections.

To delete a Dashboard, click the red **X** in the Remove column.

Similar to the Dashboards section, clicking the **Private** icon in the Reports section will bring up a list of reports stored as private.

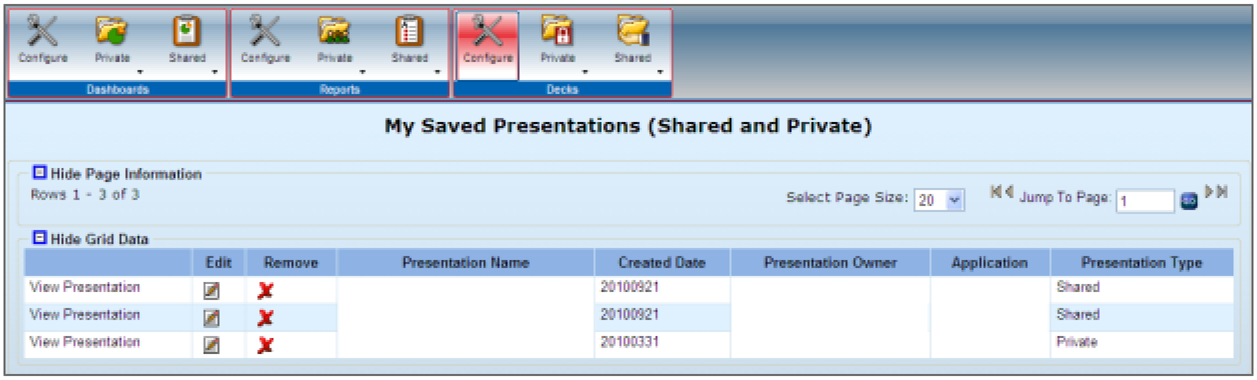


Clicking the **Shared** icon in the Reports section will bring up a list of Shared reports.

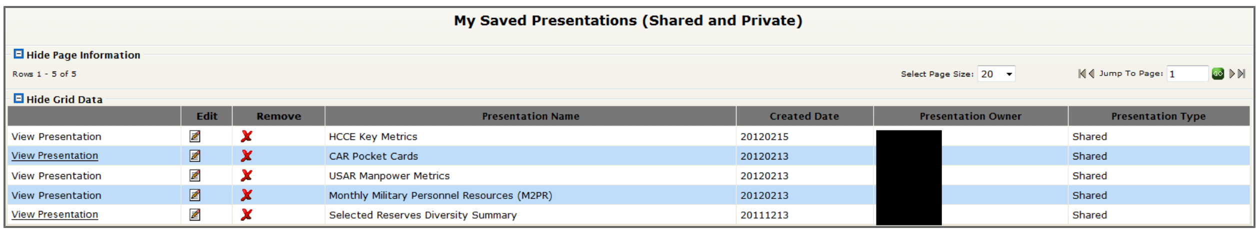


9.3.3 Decks

Click the **Configure** icon within the Decks section to see a list of your stored Decks. Note that the list shows the name of the deck and an application it falls under.



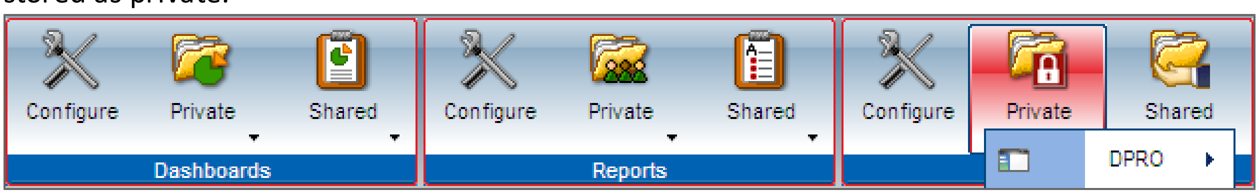
	Edit	Remove	Presentation Name	Created Date	Presentation Owner	Application	Presentation Type
View Presentation				20100921			Shared
View Presentation				20100921			Shared
View Presentation				20100331			Private



	Edit	Remove	Presentation Name	Created Date	Presentation Owner	Presentation Type
View Presentation			HCCE Key Metrics	20120215	[redacted]	Shared
View Presentation			CAR Pocket Cards	20120213		Shared
View Presentation			USAR Manpower Metrics	20120213		Shared
View Presentation			Monthly Military Personnel Resources (M2PR)	20120213		Shared
View Presentation			Selected Reserves Diversity Summary	20111213		Shared

Click the **View Presentation** link to view the slides. Click the **Update to Private** link to store the presentation as private.

Similar to the Dashboards and Reports sections, clicking the **Private** icon will bring up a list of decks stored as private.



Clicking the **Shared** icon will bring up a list of Shared Decks.